

Approved AI Tools Register

[COMPANY NAME] · Policy owner: [NAME] · Last updated: [DATE]

Tab 1: Register

#	Tool and website	Plan or account type	Who approved	Data allowed (level)	Settings and limits	Date reviewed	Notes (training, retention, who may use it)
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Tab 2: Data levels

Level	What it means	Examples
Level 1: Public only	Only information that's already public, or made-up sample data	Website text, published prices, general questions, formulas with fake data
Level 2: Internal, no personal details	Company information that isn't public, with every name and personal detail removed	Draft procedures, anonymized customer questions, internal how-to notes
Level 3: Approved personal data	Personal information for a named purpose, only in a tool the owner has approved in writing for this level	For example, a business-plan tool with training off and admin controls, approved for drafting replies to customer emails
Never	The policy's "never paste" list. No level allows it unless the owner approves a specific tool for a specific data type in writing	Passwords, codes, card and bank numbers, ID numbers, health information, security details

Tab 3: How to use this register

- One row per tool and plan.** If staff use both a free personal version and a business version of the same tool, and only the business one is approved, list the business one and write "personal accounts NOT approved" in Notes.
- Before you approve a tool,** open its own privacy or data-controls page and check: is our content used for training, and can that be turned off? How long are chats and files kept? Can people at the provider read content? Is there a business plan with admin controls? Write the answers in Notes, with the date you checked.
- Settings and limits:** record what you switched on or off (for example "training off", "chat history auto-deletes", "only managers"), and any limits ("no customer names").
- Date reviewed:** re-check every tool at least once a year, and whenever the provider announces changes to its terms or privacy policy. Update the date each time.
- Removing a tool:** don't delete the row. Write "REMOVED [DATE], reason" in Notes and tell staff.
- AI features inside apps you already use** (email, documents, accounting, design, customer chat) get their own row.

Example rows (fictional business, for illustration only)

#	Tool and website	Plan or account type	Who approved	Data allowed (level)	Settings and limits	Date reviewed	Notes
Ex. 1	[Chat assistant], [website]	Business plan, company logins	Dana R., owner	Level 2	Training off (checked in admin settings); managers and front desk only	10/15/2026	Provider's data page says business content isn't used for training by default. Personal accounts NOT approved.
Ex. 2	[AI writing feature in our email app]	Included in our business email plan	Dana R., owner	Level 1	Marketing emails only; no customer replies	10/15/2026	Re-check when the email provider updates its AI terms.