Connection Safety Sheet

One page for your office: what the AI can see, what it never does, and how to turn it off. Fill it in before anything is connected, and keep it where the owner can find it.

FILL IN · SIGN · KEEP

BUSINESS _____ DATE _____ FILLED IN BY _____

1 Who owns it

Workspace owner (the business, never a staff member's personal account)

Admin, and whose phone holds the two-step sign-in

Where the instructions and scheduled tasks live (never in an outside helper's seat)

An outside helper's seat can be removed by someone here, without the helper ☐ yes ☐ no, and why

2 What it may see

List every inbox, calendar and folder, including the ones that will never be connected.

INBOX, CALENDAR OR FOLDER	WHAT LANDS IN IT	LANE	CONNECTED?
		G A R	
		G A R	
		G A R	
		G A R	

G Green: may be connected
No patient, legal-privileged or HR information lands here.

A Amber: never connected
Sensitive only when names or ID numbers are attached. A person removes them and pastes an excerpt.

R Red: never connected, never pasted
Patient health information, privileged case files, HR files, tenant or job-applicant screening.

3 What is switched on

Green sources only. Each one signed in with a limited login, not the owner's.

CONNECTION	READ, DRAFT OR SEND?	WHICH INBOX OR FOLDER	SIGNED IN AS

4 What it never does

Tick each one once it is true here.

- ☐ Sends an email, a text or a calendar invite without a person clicking send
- ☐ Moves money, or touches payroll, HR files or bank logins
- ☐ Reads a mailbox, calendar or folder that is not on this sheet
- ☐ Speaks to a customer as if it were a person

5 Ask your AI provider

Write the answer down.

Does it train on our chats? _____

How long are chats kept? _____

Where we read that, and the date _____

Who here checks it again, and when _____

6 How to shut it off

None of these steps should need the person who set it up.

STEP	WHERE (WRITE IT IN FROM YOUR OWN SCREEN)	WHO HERE CAN DO IT
Remove an outside helper		
Disconnect one connection		
Turn a connection off for everyone		
Revoke the AI at Google or Microsoft	That login's account security, third-party access	
Delete a scheduled task		
Change the limited login's password	Google Workspace or Microsoft 365 admin	

SIGNED, OWNER _____ DATE _____

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Free to copy and use in your own office.