

Data Classification Worksheet

The Operator's Manual for Artificial Intelligence

Template Kit — Document 2 of 6

IMPORTANT — BEFORE YOU USE THESE TEMPLATES

These templates are starting points for organizations without existing AI governance. They are not legal documents and are not a substitute for qualified legal counsel. Review and adapt them to your specific jurisdiction, industry, and situation before use. Do not implement any policy, form, or checklist from this kit without professional review. The Operator's Manual for Artificial Intelligence makes no representations as to their completeness, accuracy, or fitness for any particular purpose.

1. Document Information

Field	Entry
Organization Name	[Enter organization name]
Prepared By	[Name and title]
Date	[Enter date]
Version	1.0
Reviewed By	[Name and title]
Next Review Date	[Enter date]

2. How to Use This Worksheet

Use this worksheet to determine whether a type of data may be pasted into an AI tool. Work through it before any task that involves organizational data. If you reach a row marked STOP, do not paste and escalate to your manager or the Policy Owner.

This worksheet does not replace legal advice. If you are unsure whether a data type is classified correctly for your jurisdiction or industry, consult your legal or compliance team before proceeding.

3. Classification Levels

Level	Meaning
Public	Information already published or intended for public disclosure. No restriction on use.
Internal	Information for internal use. Not sensitive, but not intended for external distribution.
Confidential	Sensitive organizational information. Limited to those with a need to know. Requires care.
Restricted	Highly sensitive. Significant harm if disclosed. Requires explicit approval before

Level	Meaning
	use in any AI tool.
Regulated	Subject to specific legal or regulatory obligations (e.g., HIPAA, GDPR, PCI-DSS, SOX). Governed by law, not only policy. Consult legal before any AI use.

4. Data Classification Reference Table

This table provides a starting point. Add, remove, or reclassify rows to match your organization and industry. Legal review is required before treating this as final.

Data Type	Classification	Safe to Paste?	Conditions or Notes
Employee names (internal context)	Internal	With care	Use first name only where sufficient
Customer or client names	Confidential	No — generally	Requires explicit policy clearance
Personal email addresses	Confidential	No	PII — do not paste without governance
Personal phone numbers	Confidential	No	PII — do not paste without governance
National ID numbers (SSN, SIN, etc.)	Restricted	STOP	Prohibited Without Governance
Dates of birth	Restricted	STOP	Prohibited Without Governance
Health or medical information	Regulated	STOP	Requires legal sign-off; may violate HIPAA or equivalent
Financial account numbers	Restricted	STOP	Prohibited Without Governance
Salary or compensation data	Restricted	STOP	Requires explicit approval
Performance reviews	Confidential	No — generally	Contains personal data; requires approval
Internal legal documents	Restricted	STOP	Attorney-client privilege may apply
Client contracts	Confidential	No — generally	Review for NDA provisions; get approval
Credentials / passwords / API keys	Restricted	STOP	Security risk — never paste
Source code (proprietary)	Confidential	Conditional	Requires approval and review of vendor data terms
Meeting notes (internal)	Internal	With care	Remove names and identifying details first
Marketing copy (draft)	Internal	Yes	Standard review before sending externally
Published public information	Public	Yes	No restriction

5. The Paste Decision Rule

If in doubt — treat it as Restricted. Stop. Escalate.

Ask yourself: "If this data appeared in a news story about a data breach, how bad would that be for the person it belongs to and for this organization?" If the answer is "significant," do not paste.

6. Task-Specific Assessment

Complete this section for the specific task you are about to perform.

Field	Entry
Task Description	
AI Tool to Be Used	
Data Involved	
Classification of Data (from Section 4)	
Is Pasting Permitted? (Yes / No / Conditional)	
If Conditional — What Approval Is Required?	
Approval Received From	
Date of Assessment	

7. Sign-off

Completed By (Name)	Date
Reviewed By	Date
Policy Owner Approval (if required)	Date