Document map

List your documents, where each lives, who may see it, how long you keep it, and whether it's OK for AI.

Sample: Parkside Accounting

DOCUMENT TYPE	WHERE IT LIVES	WHO MAY SEE IT	KEEP FOR	OK FOR AI?
Engagement letters	Shared drive › Clients	Office, owner	7 years after end	Yes
Prep and review checklists	Shared drive › Reference	Everyone	Current version	Yes
Employee handbook	Shared drive › Team	Everyone	Current version	Yes
Vendor contracts	Owner's folder	Owner	7 years	Owner only
Client tax files, staff pay records	Tax and payroll software	Preparers, owner	7 years	No

Deciding "OK for AI?"

YES

Your own business documents

Agreements, warranties, handbooks, policies, templates: in a business account, with folder access set.

LIMITED

Only some people, or names only

Supplier contracts or intake forms: a smaller folder, or remove ID numbers first.

NO

Never into AI

Card and bank details, Social Security numbers, passwords, health and pay records, anything a contract forbids.

Check each client or supplier contract for confidentiality terms before its documents go into any AI tool, including your own business account.

DOCUMENTS THAT MUST NEVER GO INTO AI, AND WHY (SAMPLE)

Client tax returns and forms: they hold Social Security numbers and income. Staff pay and medical files: private by law. One vendor contract: its terms forbid sharing.

YOUR MAP

[Business name] documents

DOCUMENT TYPE	WHERE IT LIVES	WHO MAY SEE IT	KEEP FOR	OK FOR AI?

DOCUMENTS THAT MUST NEVER GO INTO AI, AND WHY

WHO KEEPS THIS MAP UP TO DATE

LAST CHECKED (DATE)