



Safe Use Traffic Light: what you can paste where

When in doubt, treat it as one color more cautious.

GREEN Fine in any tool

- General questions: "How does percent-complete revenue recognition work?"
- Excel help using made-up or generic column names
- Email templates with placeholders like [GC NAME] and [\$ AMOUNT]
- Sample or de-identified data: "Job A," rounded or invented figures
- Public information: published rules, your firm's public website

YELLOW Only in a business-tier tool your firm has approved, signed in with your work account

- Real client or GC names attached to real figures
- Actual job cost reports, WIP schedules, margins, and AR aging
- Internal financial statements already released internally
- Vendor names with invoice amounts (no banking details)

RED Never paste into anything your firm hasn't explicitly approved for this data

- Social Security and individual tax ID numbers
- Bank account and routing numbers, including your own firm's
- Vendor banking information (a top target for payment-redirect fraud)
- Payroll detail, and union or employee personal data
- Unreleased results, and bid numbers for active bids
- Passwords or anything that grants access to a system

Free and personal plans

Free and personal plans of ChatGPT, Claude, Gemini, and Grok may use your conversations to train their models by default unless you turn it off in settings. Business plans (ChatGPT Business, Claude Team, Google Workspace, Microsoft 365 Copilot) say they don't train on your data. Check your own tool's settings, and look at how you're signed in.

Quick test

Would you be comfortable if this showed up in a stranger's inbox? If not, it's at least YELLOW. Would it cause legal, financial, or personal harm? It's RED.

If you pasted something you shouldn't have

Stop. Delete the conversation if you can. Tell your supervisor or IT right away: what, which tool, which account, when. Then follow your firm's process.

Vendor settings checked October 20, 2026. They change often.