

# 10 things to check before using AI in your practice

Verification checklist — Lawyers and accountants in Quebec

Check each item **before** submitting a document to an external AI tool.  
An unchecked box = a risk to address before continuing.

## DATA IDENTIFICATION

- No identifiable client name — or document anonymized.**  
Full names, initials combined with other information, recognizable pseudonyms.
- No file number, address or financial data — or removed before sending.**  
Account numbers, SIN, addresses, client-specific amounts.
- Document not covered by professional secrecy — or anonymized version.**  
Lawyer-client communications, confidential tax information, medical data.
- This submission can be justified to the client if asked.**  
If the answer is "no" or "maybe", anonymize first.

## SETTINGS AND ACCOUNT

- Professional account in use — not a personal account.**  
ChatGPT Team/Enterprise, Copilot for Microsoft 365 or equivalent with confidentiality agreement.
- Model training option disabled in settings.**  
ChatGPT: Settings → Data Controls → disable "Improve the model for everyone".
- Privacy policy of the tool reviewed.**  
Where is the data stored? For how long? In which country?

## BEFORE USING THE RESULT

- Anonymized version available if necessary.**  
Replace names and identifiers with neutral codes before sending.
- Result reviewed and validated before use or distribution.**  
AI can make mistakes — your professional judgment remains essential.
- AI use documented in the file if required.**  
Some bar associations and professional orders are starting to require it. Build the habit now.

### Eliminate these risks at the source with private AI

An AI hosted in your own environment transmits no data externally. That's what **PrivIA** offers — built for practices that cannot afford the slightest doubt about confidentiality.

[Learn more →](#)