AI File Upload Safety Checklist

A one-document decision check before you paste or upload

1. Decide which group the file belongs in

- [ ] PUBLIC OR LOW-RISK: already public, yours to use, and free of sensitive details.
- [ ] CLEAN-COPY NEEDED: useful content mixed with removable names, IDs, financial details, or private comments.

> DO NOT UPLOAD: passwords, recovery codes, government IDs, bank records, medical or HR records, signed contracts, client files, or confidential work data in a personal AI account.

2. Send only what the task needs

- [ ] Copy only the relevant pages or paragraphs.
- [ ] Remove names, addresses, phone numbers, signatures, account numbers, exact internal prices, private notes, and unrelated content.
- [ ] Use placeholders such as [CLIENT], [AMOUNT], and [DATE] when the real value is not needed.

3. Check hidden and easy-to-miss data

- [ ] Remove tracked changes, comments, document history, author fields, notes, and hidden sheets or slides.
- [ ] Do not cover text with a black shape. Remove it from a separate copy or use a real redaction tool.
- [ ] For scanned PDFs, check whether OCR left searchable text behind the image.

AI File Upload Safety Checklist - continued

4. Check permission and account context

- [ ] Do I own this information or have permission to use it?
- [ ] Does my employer, school, client, or organization allow this tool?
- [ ] Am I using the correct approved workspace instead of a personal account?

5. After the task

- [ ] Compare important names, dates, numbers, obligations, and conclusions with the original.
- [ ] Delete the chat, uploaded file, saved source, project copy, and public share link when they are no longer needed.
- [ ] Keep the original separate from the cleaned working copy.

If you cannot make a safe clean copy, do not upload the file to a consumer AI tool.

Continue on H5W

Source guide: https://www.h5w.com/is-it-safe-to-upload-documents-to-ai/

Remove personal information before uploading: https://www.h5w.com/how-to-remove-personal-information-before-uploading-a-file/

Summarize a PDF with AI: https://www.h5w.com/how-to-summarize-a-pdf-with-ai/

Information last verified: October 18, 2026. This resource is general educational guidance. Check current official rules and professional advice when the decision is high impact.