

# How \_\_\_\_\_ uses AI

Anyone here who uses AI follows this page. Fill in the blanks, keep it next to the computer, and show it to new staff on their first day.

## FINE TO PUT INTO AI

- ☐ A client's question without their name or passport number, like "what English score does a 485 applicant need?"
- ☐ Our own articles, notices, emails and social media drafts
- ☐ Public visa requirements and form guides from the Home Affairs website

## NEVER PUT INTO AI

- × Passports, visa grant letters, birth and marriage certificates, police checks
- × Health exam results, medical history, any health information
- × A client's full name with their passport number, birth date, phone or address
- × Proof of funds, bank statements, tax records; sponsors' and employers' financial records
- × Logins for ImmiAccount or school application portals; any password

## BEFORE IT GOES OUT, WHO CHECKS

### WRITTEN WITH AI

### CHECKED BY

### WHAT THEY CHECK

|                                                       |                                  |                                                                                     |
|-------------------------------------------------------|----------------------------------|-------------------------------------------------------------------------------------|
| Emails and messages to clients                        | Whoever wrote it                 | Names, subclasses and deadlines are right; no promises like "this will be approved" |
| Visa requirements, conditions and document checklists | Registered migration agent _____ | Every statement is on the Home Affairs website or in the law, or it comes out       |
| Draft statements and support letters for lodgement    | Registered migration agent _____ | Every fact comes from the client's own documents, none from AI                      |

## THE AI WE USE

### TOOL AND PLAN

### ACCOUNT OWNER

### USED BY

### CHATS USED FOR TRAINING

Off / no switch (where to turn it off: page 2)

## IF YOU'RE NOT SURE

Ask \_\_\_\_\_. If you're still not sure, leave it out and write it yourself.

Client information can't go to a third person without the client's written consent (Code s 35, page 2). If you're not sure whether pasting it into AI counts, get written consent first or leave it out.

When someone leaves or an account isn't needed, change the password that day and remove them.

Agreed by \_\_\_\_\_ Date \_\_\_\_\_

## DOES EACH AI TRAIN ON YOUR CHATS?

| TOOL    | PERSONAL ACCOUNT                                                                        | WHERE TO TURN IT OFF                                        | BUSINESS PLANS                                        |
|---------|-----------------------------------------------------------------------------------------|-------------------------------------------------------------|-------------------------------------------------------|
| ChatGPT | Yes, by default                                                                         | Settings → Data controls → “Improve the model for everyone” | Business and Enterprise: not by default               |
| Claude  | You choose when you sign up                                                             | Settings → Privacy → the model improvement switch           | Team, Enterprise and API: not by default              |
| Copilot | Older app: yes, by default. New app (from Aug 2026): not confirmed on Microsoft’s pages | Settings → Privacy → “Training on conversation activity”    | Microsoft 365 work account: no, and there’s no switch |
| Gemini  | Yes, while “Keep Activity” is on                                                        | Gemini Apps Activity → turn off “Keep Activity”             | Google Workspace: not by default                      |

These switches move and get renamed, so we check them against the official pages every month. Turning one off doesn’t necessarily pull back chats from before.

## WHAT MIGRATION AGENTS NEED TO KNOW

The OMARA’s Code of Conduct for registered migration agents (in force since 1 March 2022) has a few sections that matter most for AI (full text, PDF):

Section 35: except as required by law, an agent must not disclose, or allow to be disclosed, to a third person any personal information about a client or former client, or their affairs, without the client’s written consent.

Section 53: documents belonging or relating to clients and former clients must be kept securely.

Section 56: every client needs a client file, including copies of all written communications (electronic too) with the client; keep it for 7 years after the last action on it.

Sections 15 and 26: no false or misleading statements, including when promoting your business.

Most small businesses with an annual turnover of \$3 million or less aren’t covered by the Privacy Act, but some are (OAIC). The OAIC recommends that organisations “do not enter personal information, and particularly sensitive information, into publicly available generative AI tools” (OAIC). Passports and health information are exactly that kind.

## ABOUT THIS PAGE

This is a free template, not legal advice. The OMARA and OAIC pages and the law itself are what count; if you’re unsure, ask the MIA or a lawyer.

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