



EXECUTIVE INFOGRAPHIC GUIDE

# The AI Data Safety Guide for Accounting Teams

A practical red/yellow/green framework for safer AI use inside modern firms.

THE BIG SHIFT

# AI is already inside accounting workflows.

Most firms already have AI exposure, even if leadership has not formally approved it.

SHADOW ADOPTION

TOOL SPRAWL

UNREVIEWED OUTPUT

The risk is rarely one dramatic decision. It shows up through everyday tools: drafting, research, document handling, workflow automation, and accounting software features that quietly add AI into the operating environment.

ASSISTANT

**ChatGPT**

WORKSPACE

**Copilot**

PRACTICE STACK

**AI accounting software**

OPERATIONS

**Document workflows**

CLIENT COMMS

**Email drafting**

RESEARCH

**Guidance assistance**



RED / YELLOW / GREEN

# Not all accounting data carries the same AI risk.

Modern firms need a simple operational framework for deciding what can safely interact with AI systems.

CLASSIFY

APPROVE

REVIEW



RED

## Never paste.

Client-identifiable data, regulated records, source documents, tax files, bank data, and payroll details stay out of unapproved AI systems.



YELLOW

## Requires approval.

Redacted examples, anonymized workflows, training scenarios, and generalized transaction patterns need review before use.



GREEN

## Generally safe.

Public guidance, blank templates, internal process questions, and non-client-specific drafting are safer starting points.



RED DATA

# If it identifies a client, treat it as RED.

Red data is not a fear category. It is an operating boundary for information that creates confidentiality, compliance, or client trust risk.

RESTRICTED PROMPT INPUT

APPROVAL REQUIRED

EVIDENCE RETAINED

RESTRICTED DATA GROUPS

### Identity records

SSNs, EINs, addresses, client names, signer details.

### Financial source data

Bank records, payroll files, ledgers, transaction-level exports.

### Client work product

Tax returns, engagement letters, source documents, workpapers.

CONTROL POSTURE



## Never paste raw records.

Use approved environments, redaction, and reviewer evidence before AI touches restricted data.

No public AI

No raw uploads

No client identifiers



YELLOW DATA

# Yellow data requires operational judgment.

This is where firms need process, not panic. The question is whether the information is de-identified, appropriate for the tool, and reviewed before it becomes work product.

REDACTION GATE

TOOL APPROVAL

REVIEWER SIGNOFF

1

Redact client identifiers, account details, exact dates, and unusual transaction references.

2

Confirm the AI tool is approved for the workflow, retention posture, and data type.

3

Use AI for structure, draft language, training examples, or generalized reasoning.

4

Review before any output enters client files, deliverables, or staff guidance.

GREEN DATA

# Green data is where most firms should begin.

Safe adoption starts with use cases that improve thinking and documentation without exposing client records.

LOW SENSITIVITY

REUSABLE PATTERNS

STAFF ENABLEMENT



ENABLEMENT ZONES

### Drafting support

Generalized emails, internal explanations, process notes.

### Process design

Workflow questions, checklist improvements, SOP structure.

### Training lift

Examples that teach staff review habits without client exposure.



OPERATIONAL CHECKLIST

# The 5-Second AI Safety Check

Before using AI, pause long enough to confirm the prompt belongs in the tool you are about to use.

PROMPT REVIEW

OUTPUT STATUS

LEADERSHIP TEST

- Does this contain client-identifiable information?
- Is the tool approved?
- Is this draft-only?
- Has this been reviewed?
- Would leadership approve this prompt?



FRAMEWORK

# Governance does not need to become a massive project.

The Nexairi AI Governance Framework helps firms move from informal AI usage to documented operational standards.

REGISTER

STANDARDS

REVIEW RHYTHM

FRAMEWORK ARCHITECTURE

TOOL REGISTER  
DATA CLASSES  
WORKFLOW APPROVALS  
REVIEWER EVIDENCE

ACCESS THE FRAMEWORK

JOIN THE NEWSLETTER

BOOK A GOVERNANCE REVIEW

Start with a practical register, clear data categories, approved workflows, and a review rhythm your team can actually maintain.