

Your agency AI data-handling and review playbook

From Tyler Mayberry, Cirlet · cirlet.com · 8 October 2026 · General information, not legal advice: check with your attorney.

Agree the work before connecting accounts

Record the chore, the source records, the output, who checks it and what stays with licensed staff. Keep coverage decisions, advice and final sends with the agency. Confirm the actual software access for this job.

Record the tools and information

List the agency-owned computer, software accounts, AI provider and approved information. Record what text or screenshots the provider receives, its retention terms and training settings. Disabling model training does not mean zero retention. Keep credentials out of prompts and shared lessons.

Make review repeatable

Check the right customer, current source documents, dates and identifiers. Trace extracted values back to their sources. Hold missing or conflicting information. Record who reviewed the output, what changed and the next action. Use fictional data for shared practice.

Know how to stop and get help

Name the staff contact and backup, the stop procedure and the fallback route. Report a problem to tyler@cirlet.com. Record the relevant incident facts without putting customer data into support notifications. Follow the incident and notification arrangements in your agreement.

Keep your vendor record current

Keep the agreement, account inventory, access permissions, provider terms, staff instructions and incident contacts together. Your agency and advisers determine which state and other requirements apply. This worksheet is not a legal compliance certification.

Train the next person

Use the Cirlet learning library and a fictional example. Have the colleague produce a draft, check its source, spot an error and explain when to stop. Keep lifetime library access, including updates, after paid support ends.

Ask anyone who touches your client data (a VA, an outsourcing firm, an AI tool)

The question	How Cirlet's AI assistant answers
1. Agreed chore and output	_____
2. Staff reviewer and backup	_____
3. Approved tools and information	_____
4. Stop procedure and help contact	_____

Sources: Cirlet: AI plan and data; NAIC: cybersecurity background. Confirm requirements for your agency with your advisers. Checked 8 October 2026. Online: insuranceagencyvirtualassistant.com/agency-data-handling. Tyler Mayberry, Cirlet: cirlet.com