

# Tip sheet

## Best practices: artificial intelligence in your professional practice

This tip sheet presents five best practices for familiarizing yourself with the principles of responsible use of artificial intelligence (AI) in your practice. This tip sheet is not exhaustive: AI is constantly evolving, as are best practices.



This tool and the practices listed therein mainly concern generative AI, but are not limited to it.

### 1. Know your employer's policies.

Familiarize yourself with your employer's AI policies and abide by them. Ask yourself questions like:

- Are you allowed to use AI systems in your work?
- If so, are some AI systems allowed and others not?
- In what circumstances, for what purposes and for what tasks is AI appropriate?

### 2. Attend training courses on the subject offered by your employer or other organizations, and perfect your knowledge of the features and functionalities of authorized artificial intelligence systems (AIS).

- **Understand** the objectives and limitations of the AIS you are using, and take the necessary training to use it properly.
- **Evaluate** the benefits and risks associated with the use of different AIS and the resulting decisions.
- **Experiment** with the tool to fully understand its capabilities and limitations.
- **Check** and compare results with other colleagues and other AIS, if available.

### 3. Protect the confidentiality of your customers' and your organization's data and personal information.

- If your company uses a private, closed AIS, information and data circulate within the company's IT architecture only.
- However, if the company authorizes the use of a public generative AI system (such as the public version of ChatGPT), it has no control over the data or content uploaded to the AIS, and thus loses ownership of it.
- In this case, make sure your requests do not contain personal information, original company texts or confidential data.



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**4. Reread and check the information and results you have obtained, as AI can produce mistakes or false information.**

If you use an AIS, for example, to:

- transcribe or summarize conversations, meetings or file notes;
- generate text or graphics;
- carry out research or summarize a report;

check the results and correct the information if necessary before using and communicating the generated content!

**5. Be transparent about your use of technology.**

If you use an AIS to make decisions, perform an analysis or make a recommendation to the consumer, say so!

- Distinguish between the use of AI with limited or low risk (e.g. an application for writing or accounting assistance) to a high-risk AI (e.g. preparing an offer, analysis or recommendation for a customer), which may have implications for confidentiality or fair treatment of the consumer.
- Disclose information to customers about the use of AI in products and services, and the results that apply to them, in **simple, clear language**, free from technical jargon.
- Inform consumers, by an appropriate means (for example, a mention or a digital watermark), that content published by a financial player has been created, in whole or in part, by generative AI.
- Upon request, provide a list of a customer's personal and confidential information that has been used by the AIS, and ensure that you are able to correct or update it if it is incorrect.

## IN CONCLUSION



Use your judgment and keep a critical eye:

An AIS is a tool designed to support you in your work, but it does not replace your expertise. Be aware of the potential errors, biases and inaccuracies of such a system, as they could harm the public and engage your liability.

The translation of this document was done using AI but was reviewed by humans.