

Email & Records Workflow (Gmail + AI) - Checklist

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1) Choose Your Inbox

- Use one dedicated Gmail/Workspace account for all records work.
- Turn on 2-Step Verification.
- Create a signature with your contact info and support link.

2) Labels

- `TPIA/FOIA - Drafts`, `Filed`, `Production - Received`, `Deadlines`, `Appeals`, `AG - Rulings`, `Invoices`, `Agency - [Name]`.

3) Filters

- Auto-label emails from agencies and the AG's office.
- Auto-star messages with "within X business days".

4) Connect to AI (built-in)

- ChatGPT: Settings > Connectors > connect Gmail, Calendar, Contacts.
- Claude: Settings/Integrations > enable Gmail (and Calendar if useful).

5) Drive Organization

Records/ Requests/ Productions/ Rulings/ Timelines/

6) First Tasks

- Draft a narrow request (time-boxed, format-specific, cost-capped).
- Ask ChatGPT to create a deadlines table from your state handbook PDF.
- Ask Claude to draft a cover email and create your folder structure via Desktop Commander.

7) Hygiene & Security

- Keep logs of requests, fees, and deadlines.
- Store secrets in .env files (not in prompts).
- Redact responsibly; verify against the statute.