AI Use Policy

[Practice Name]

EFFECTIVE DATE	POLICY OWNER	APPLIES TO	VERSION
[Date]	[Name or role]	All providers and staff	1.0

1. Purpose

[Practice Name] wants providers and staff to use AI tools to do better work for patients. This policy explains which AI tools are approved, what information must stay out of them, and who to ask when something is unclear. It applies to every provider, employee, contractor, student and temporary worker.

2. Approved AI tools

Use only the AI tools on this list for practice work, and sign in with your practice account.

- [Approved tool 1, for example Claude]
- [Approved tool 2, for example Microsoft Copilot]
- [Approved tool 3]

Any AI tool not on this list is not approved. This includes AI websites, browser add-ons, phone apps and AI programs installed on a computer.

3. Information that must never go into an AI tool

Never type, paste or upload any of the following into an AI tool that is not on the approved list. For approved tools, follow the limits in section 8.

- Patient names, records, images and anything that could identify a patient
- Insurance, billing and payment information
- Passwords, sign-in codes and security details
- Employee records and personal details
- Financial records of the practice
- Anything covered by a confidentiality agreement or contract

4. What you must do when you use AI

- Check everything AI produces before you use it or send it. AI can be wrong and still sound certain.
- You are responsible for the work you send, whether or not AI helped write it.
- Say that AI was used when a patient, a payer or the law requires it.
- Do not let AI make final decisions about people, such as hiring, pay or discipline.

5. How to request a new AI tool

Send the name of the tool and what you want to use it for to [Name or role]. Do not use the tool for practice work until it is added to the approved list.

6. Monitoring

[Practice Name] monitors the use of AI tools on practice computers and accounts. Monitoring shows which AI tools are used, by whom and for how long. It is used to keep this policy working and to protect patient and practice information.

7. If this policy is not followed

Tell [Name or role] right away if you think patient information or other restricted information was entered into an AI tool. Reporting a mistake quickly matters more than the mistake. Ignoring this policy on purpose may lead to disciplinary action.

MEDICAL OFFICE RULES

8. Patient information

- Patient information may go only into an approved AI tool whose vendor has signed a business associate agreement (BAA) with the practice. [Name or role] keeps the list of those tools.
- Use the minimum patient information the task needs. Remove names and other identifiers when the task can be done without them.
- Never enter patient information into a free or personal AI account, even one from an approved company.

9. Clinical use and accuracy

- AI does not diagnose or decide treatment. A licensed clinician reviews and is responsible for anything AI drafts before it enters the chart or reaches a patient.
- Check AI-drafted notes, letters, summaries and billing codes against the record before signing or submitting them.
- Tell patients, and get any consent your state requires, before an AI tool records or transcribes a visit.

10. Privacy officer, incidents and training

- Report patient information entered into an unapproved AI tool to the privacy officer, [Name], right away. It may need to be assessed as a possible breach.
- Complete the practice's privacy and AI training before using AI tools with patient information.
- The privacy officer reviews the approved tools list and this policy at least once a year.

I have read and understand this AI Use Policy.

Name	Signature	Date

This template was written with the HIPAA Privacy, Security and Breach Notification Rules in mind. It is a starting point, not legal or compliance advice. Have your privacy officer or healthcare attorney review it before you adopt it.