Sample AI Use Policy

A starting template. Replace every [bracketed] field, delete what does not apply, and have your compliance advisor or attorney review it before staff sign. Template only; it is not legal advice.

Practice: [Practice name] **Effective date:** [date] **Policy owner:** [name, role]

1. Purpose and scope

This policy sets how [Practice name] uses artificial intelligence (AI) tools for practice work. It applies to all employees, contractors and students, on any device, including personal phones and computers used for practice work.

2. Approved tools

Only the tools listed here may be used for practice work. The policy owner keeps this list current.

Tool (describe it)	Account type	BAA in place	Approved uses	Approved by	Date
[AI assistant built into our productivity suite]	Practice account only	[Yes / No]	*[Drafting letters and handouts; summarizing documents]*		

3. Patient information

- Patient information (PHI) may be entered only into an approved tool that is covered by a business associate agreement (BAA), while signed in with a practice account.
- Use the minimum necessary. Remove or limit names, dates of birth and other identifiers whenever the task allows.
- Confirm that the specific AI feature is covered by the BAA. A BAA for the main service does not always cover every feature or add-on.

4. Not allowed

- Using a personal account for any practice work, even with an approved tool.
- Entering PHI into any tool that is not on the approved list.
- Entering passwords, access codes or payment card numbers into any AI tool.
- Putting AI output into a patient record, a bill or a message to a patient without review.

5. Clinical responsibility

AI tools used here are not clinically validated. The clinician owns every clinical decision, note and bill, and reviews all AI output before it is used. AI output is a draft until a clinician or staff member has checked it.

6. New tools

Send requests for a new AI tool or feature to [policy owner]. Each request is scored with the Human Filter Worksheet, and no PHI is entered until a BAA is in place and the tool is added to section 2.

7. Patients (optional)

[Choose one, or delete this section: We tell patients when AI helps with documentation or communication, by [method]. / We do not currently use AI in ways that involve patients directly.]

8. Training and acknowledgment

Staff review this policy at hire and each year with security awareness training. Report a mistake, such as PHI entered into the wrong tool, to [policy owner] the same day so it can be assessed.

9. Review

Policy owner: [name]. This policy is reviewed at least yearly and when the practice adds an AI tool. Next review: [date].

Staff acknowledgment

I have read this policy and will follow it.

Name	Signature	Date