FILLABLE TEMPLATE · ONE PAGE OF TRUTH

One page that ends *the guessing.*

The single document every staff member can check before using any AI tool: what is approved, for what, and with what data.

INTERNAL PRACTICE GOVERNANCE DOCUMENT — NOT FOR PUBLIC DISTRIBUTION.

WHAT THIS IS
A fillable register of every AI tool your practice has approved, rejected, or is reviewing, with the columns that matter: approved use, PHI permission, BAA date, owner, and review date.

HOW TO USE IT
Post it where staff actually look (break room, intranet, EHR bulletin). Update it the day a decision is made, and version it: an outdated approved list is worse than none, because staff will trust it. Pair it with Section 4 of the AI Policy Starter.

Practice name: _____

List owner (role): _____

Version: _____

Last updated: _____

Approved tools

Tool + vendor	Approved for (task)	PHI permitted? (Y/N + data & conditions)	BAA date	Approved by / date	Review by

Under review

Tool + vendor	Requested by	Task it would solve	Status / next step

Not approved (and why)

Tool + vendor	Reason	Date

WHY THE THIRD TABLE MATTERS

The "not approved" section is not bureaucracy. It is the answer to "but nobody ever told us" and it protects the staff member who checked the list and did the right thing. Every rejection with a reason teaches your team what safe looks like.

Keep reasons factual and restrained. Use categories such as: BAA unavailable on the selected tier; retention terms unresolved; requested use not approved; accuracy evidence insufficient for the intended workflow; contract terms not accepted; or review incomplete. Avoid conclusory claims that a named vendor is “unsafe,” “fraudulent,” or “violates HIPAA” unless counsel has approved that statement.