

AI Use & Consent Audit

A practical worksheet for allied health practices

Use this worksheet to take stock of the AI tools running in your practice, sort out which ones need patient consent, and put one consistent policy in place instead of leaving it up to whoever happens to be using what.

Pair this with the sample consent paragraph in our blog post, *A Practical Guide to AI Consent for Allied Health Practitioners*, to turn this audit into a finished intake form addition.

1 Tool inventory

List every AI tool running in your practice, what it's used for, and whether it touches patient data. If it touches patient data, it needs a consent step.

Tool / Platform	What it's used for	Touches patient data?	Notes
AI scribe (e.g., BizzyAI: Scribe)			
AI writing assistant (e.g., BizzyAI: Write)			
Appointment reminders / SMS automation			
Billing & invoice automation			
Waitlist matching			
Referral letter drafting			
Client intake form processing			

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2 Across the practice

Are different people in your practice using different tools? This is worth checking even in a small team. Shadow AI, meaning staff adopting tools independently without a shared policy, is one of the easiest ways a practice ends up with inconsistent consent language and a compliance gap nobody notices until someone asks about it.

Staff member / role	Tool(s) they use	What for

3 Consolidate into one policy

Once the inventory above is filled in, use it to settle on one practice-wide approach rather than leaving each tool's consent handled differently person to person.

- Write one consent paragraph covering every tool identified above that touches patient data.
- Decide whether each tool needs a verbal mention or a written line in your intake paperwork.
- Add the paragraph to your existing intake form (no need for a separate document for most solo and small practices).
- If multiple staff use different tools, circulate one shared AI policy so everyone is disclosing the same things, the same way.
- Set a review date to revisit this worksheet as tools change or new ones get added.

Reviewed by: _____ Date: _____

Next review date: _____