Veterinary AI Use Policy

One-page template, version 1.0. Fill in the blanks, cut what doesn't apply, and keep it to one page.

Practice: _____ **Effective date:** _____

AI lead: _____ **Backup:** _____

Approved by (owner or medical director): _____

Next review (6 months, or before any new AI tool): _____

1. Scope

This page sets the rules for using AI tools on practice business. It applies to everyone who works here, on any device, including free tools and personal accounts. If something isn't covered, ask the AI lead before you do it.

2. Approved tools

Tool	What we use it for	Who may use it	Highest data level
e.g., AI scribe	*Drafting SOAP notes for review*	*DVMs and technicians*	*Amber*

A tool that isn't on this list isn't approved, even if it's free or built into software we already own.

3. Data rules

GREEN	**Any approved tool, including general chatbots**	General medical or drug questions with no names or identifiers, marketing drafts, public information, templates with names removed.
AMBER	**Only tools approved for amber, with written vendor answers on storage, retention, model training, and deletion**	Client names and contact details, patient records, lab results, images, exam-room recordings.
RED	**Never in any AI tool**	Payment card and bank numbers, passwords and logins, staff personnel and pay records, anything a client asked us to keep private.

Personal and free accounts are green only. Not sure? Treat it as red and ask the AI lead.

4. A human signs off

- A veterinarian reviews and signs every AI-drafted medical record before it's filed.
- Medications, doses, units, and instructions are checked against the source every time.
- A team member reads anything AI wrote before it goes to a client.
- AI output on imaging, labs, or cytology is a second opinion. The veterinarian decides and documents it.

5. Telling clients

If a tool records or transcribes a visit, we tell the client before it starts and turn it off if they ask. Script: “We use a tool that helps the doctor write up today's visit from our conversation. Is that okay with you?” (Check your state's recording consent rules.)

6. New tools and do-it-yourself AI

No new AI tool, browser extension, custom GPT, or homemade agent touches practice data until the AI lead approves it. Bring ideas to the AI lead, who will answer within ____ days.

7. Before we buy, and 90 days after

Before: Where is our data stored, and for how long? Is it used to train the vendor's models? How does it connect to our PIMS? What's the total cost?
At 90 days: Is it accurate on our caseload? What did integration cost us? Is support responsive? Does it still earn its fee? Decide: keep, fix, or drop.

8. Training and mistakes

Everyone is trained on a tool before using it, front desk and technicians included. If AI gets something wrong, or data goes where it shouldn't, tell the AI lead the same day. Reporting is never punished.

Team acknowledgment. I've read this page and will follow it.

Name: _____ **Signature:** _____ **Date:** _____