AI Tool Register — Fill-In Template

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One page that lists every AI tool touching your practice — what it does, what data it sees, where that data goes, and who approved it. The register most practices don't have, ready to print and fill in today.

AI Tool Register — Fill-In Template

The AI tool register for _____ (practice name). Maintained by _____. Last reviewed: _____.

> **How to use this:** list every AI tool that touches the practice — including AI *features inside* other software (your PMS, your email, your marketing platform) and tools your **agency or suppliers** use on your behalf. One row each. Review the register quarterly and whenever a new tool arrives. Print it, or keep it wherever your policies live.

Why keep a register

- **You can't manage what you haven't listed.** The riskiest AI tool in the practice is the one nobody wrote down.
- It turns "are we okay?" into a five-minute check: every tool, its data, its approval — one page.
- When something goes wrong (or a patient, insurer or adviser asks), the register is the first thing you'll wish you had.

The register

#	Tool / AI feature	What it does for us	Patient data it can see?	Where data goes (AU / overseas / unknown)	Acts on its own, or human approves?	Owner approved (name, date)
1	_____	_____	none / some / identifiable	_____	reads only / acts with approval / acts alone	_____
2	_____	_____	none / some / identifiable	_____	reads only / acts with	_____

#	Tool / AI feature	What it does for us	Patient data it can see?	Where data goes (AU / overseas / unknown)	Acts on its own, or human approves?	Owner approved (name, date)
					approval / acts alone	
3	_____	_____	none / some / identifiable	_____	reads only / acts with approval / acts alone	_____
4	_____	_____	none / some / identifiable	_____	reads only / acts with approval / acts alone	_____
5	_____	_____	none / some / identifiable	_____	reads only / acts with approval / acts alone	_____
6	_____	_____	none / some / identifiable	_____	reads only / acts with approval / acts alone	_____

*Don't forget: AI scribes · chatbots/AI receptionists · browser extensions · AI features in your PMS or email · transcription/dictation · marketing/social tools (yours **and your agency's**) · backup or document tools with AI review.*

How to read your own register (the patterns that matter)

- **Any row with "identifiable" + "overseas/unknown"** → that's a cross-border disclosure question (APP 8). Confirm where the data goes before relying on the tool. *(Review trigger, not a declared breach.)*
- **Any row with "acts alone"** → the highest-risk pattern. Ask the vendor for an approval gate, or reconsider. A tool that only *reads and suggests* is a different risk class from one that *acts*.
- **Any row you couldn't fill in** → that's not a gap in the form; it's a question for the vendor. The vendor questions guide is the script.
- **A tool nobody remembers approving** → decide now: approve it properly, or remove it.

Keep it alive

Routine	When
New tool or AI feature arrives → add a row *before* it's used	As it happens
Quarterly review — every row still accurate? still needed?	Every 3 months
Annual clean-out — remove tools no longer used (and close their accounts)	Yearly

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This is a general template for practice workflow governance. It is not legal advice and completing it does not establish compliance with the Privacy Act, the Australian Privacy Principles, state laws (such as the NSW HRIP Act), or any other obligation. Adapt it to your practice and seek qualified advice for your circumstances.

Disclaimer: Educational guidance only, not legal advice. This guide is intended for practice workflow education. Do not enter patient-identifiable information into public AI tools.
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