

# AI Vendor Scorecard — Fill-In Template

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One page to score any AI vendor before you switch them on — scribe, receptionist bot, recall tool, marketing AI. Six questions that decide whether your practice can use it safely, a row per vendor, and a simple traffic-light verdict you can defend later.

## AI Vendor Scorecard — Fill-In Template

The AI vendor scorecard for \_\_\_\_\_ (practice name). Completed by \_\_\_\_\_ . Vendor assessed: \_\_\_\_\_ . Date: \_\_\_\_\_ .

**How to use this:** before any AI tool goes live — and before renewal of anything already live — sit down with the vendor's answers (or their privacy policy and your sales rep) and fill in one column per vendor. If the vendor can't or won't answer a question, that *is* the answer: score it red. Keep the completed scorecard with your practice policies and add the vendor to your [AI Tool Register](#).

### The six questions that decide it

Score each: **Green** (clear, written, acceptable answer) · **Amber** (vague, verbal-only, or "on the roadmap") · **Red** (no, unknown, or refused).

#	Question	Vendor's answer (write it down)	Score
1	<b>Where is our data stored and processed?</b> Country and provider — and if overseas, do they acknowledge Australian privacy obligations apply?	_____	green / amber / red
2	<b>Is our data used to train their models?</b> Default on or off? Can we opt out in writing?	_____	green / amber / red
3	<b>Who else touches the data?</b> Sub-processors listed in writing? Are any of them overseas?	_____	green / amber / red
4	<b>Can we delete it?</b> Patient-level deletion on request, and full export + deletion if we leave?	_____	green / amber / red
5		_____	

#	Question	Vendor's answer (write it down)	Score
	<b>Is there an audit trail?</b> Can we see who accessed what, when — and can they show it during an incident?		green / amber / red
6	<b>What's the patient consent story?</b> Does the tool require consent we don't currently collect (recording, transcription, profiling) — and who provides the wording?	_____	green / amber / red

## The verdict

Verdict	Rule of thumb
<b>Proceed</b>	All green, or one amber with a written remediation date
<b>Proceed with conditions</b>	Ambers only — write the conditions on this page and diarise the review
<b>Stop</b>	Any red on questions 1, 2 or 4 — these are the ones you can't unwind later

Verdict for this vendor: \_\_\_\_\_ Review date: \_\_\_\_\_ Owner sign-off:

\_\_\_\_\_

## Three habits that make this work

- **Ask in writing, keep the writing.** A sales call answer is amber at best. An email from the vendor is evidence.
- **Score the contract, not the demo.** The demo shows what the tool does; the contract shows what happens to your data. They are often different stories.
- **Re-score on renewal and on any "new AI feature" announcement.** Vendors change models, sub-processors and training defaults — your last scorecard may already be stale.

## Where this fits

This scorecard is the worked version of [the seven questions guide](#) — read that first if a vendor pitch is sitting in your inbox. Tools that pass still belong on your [AI Tool Register](#), and if the tool touches clinical notes or patient conversations, walk through the [AI Scribe Consent Checklist](#) before go-live.

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*General template, not legal advice. Review and adapt before use; scoring a vendor green here is your practice's own assessment, not a certification.*

**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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