

AI Vendor Scorecard — Fill-In Template

By Scott Farrell — LeverageAI · dental.leverageai.com.au/about

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

Prepared for Example Dental Clinic, Sydney · 15 Jun 2026 · part of your private Dental AI Blueprint. Review and adapt before adopting — general guidance, not legal advice.

The AI vendor scorecard for **Example Dental Clinic** (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	Where is our data stored and processed? Country and provider — and if overseas, do they acknowledge Australian privacy obligations apply?	_____	green / amber / red
2	Is our data used to train their models? Default on or off? Can we opt out in writing?	_____	green / amber / red
3	Who else touches the data? Sub-processors listed in writing? Are any of them overseas?	_____	green / amber / red
4		_____	

#	Question	Vendor's answer (write it down)	Score
	Can we delete it? Patient-level deletion on request, and full export + deletion if we leave?		green / amber / red
5	Is there an audit trail? Can we see who accessed what, when — and can they show it during an incident?	_____	green / amber / red
6	What's the patient consent story? 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
Proceed	All green, or one amber with a written remediation date
Proceed with conditions	Ambers only — write the conditions on this page and diarise the review
Stop	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.

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.

Author: Scott Farrell, LeverageAI — scott@leverageai.com.au · <https://dental.leverageai.com.au>