



## Documenting AI Use Professionally

*Guidance on how to document AI use in compliance with HIPAA, FERPA, and your professional ethics code.*

Documentation is one of the most overlooked areas of AI compliance. Most clinicians focus on whether they can use a tool, and overlook the question of whether they have documented that use in a way that is professionally defensible. This article addresses both.

### When Documentation Is Required

Not every AI use requires formal documentation. The threshold is whether the use is clinically relevant or affects the client experience. Here is a practical guide:

AI Use	Documentation Required?	What to Include
Drafting admin emails or non-clinical materials	Generally no	Not required unless PHI involved
Drafting progress notes or treatment plan language	Yes	Note that AI assisted drafting; confirm clinician reviewed and takes responsibility for final content
Recommending or assigning an AI-supported app	Yes	Document the app, its purpose, disclosure to client, and consent if obtained
Using AI for case conceptualization or clinical reflection	Recommended	Brief note that AI was used for therapist reflection only, not as a clinical tool
Client-facing AI use of any kind	Yes	Document disclosure, consent, client response, and monitoring plan

### Sample Documentation Phrases

These phrases can be adapted and dropped directly into your notes:

#### AI-assisted drafting

*Progress note drafted with AI writing assistance. Clinician reviewed, edited, and takes full professional responsibility for the content as documented.*

#### App recommendation

*Clinician discussed the use of [app name] with client as a between-session support tool. Client was informed of the app's purpose, limitations, and that it is supplemental to therapy and not a crisis resource.*

**Disclosure of AI use**

*Client was informed that limited AI tools may be used to support administrative workflow and documentation. Client had opportunity to ask questions and expressed understanding.*

**Discontinuation**

*Use of AI-supported tool discontinued. Clinician noted concerns regarding [fit, accuracy, client response]. No adverse effects to client care identified.*

**The documentation standard:** Document your AI use the way you would document any other clinical decision. Note what you used, why you used it, what you did with the output, and what the client was told. If you would not be comfortable reading that documentation aloud in a licensing board hearing, revise it before filing.