

The CLINIC Guard Method™

CLINIC Guard Workbench — Free Starter Worksheet

AI Tool Inventory Starter Sheet

A simple worksheet for listing every AI tool in use, who owns it, and what data it touches.

Organization: _____

Date: _____

For each AI tool or assistant in use, fill in one block.

Tool name _____

Vendor / website _____

Who owns it here (name + role) _____

What it is used for _____

Who uses it _____

Data entered into it (check all that apply):

☐ No personal data

☐ Business / operational only

☐ Personal contact data

☐ Health or clinical information

Where the vendor stores data _____

Risk level: ☐ Lower (admin support) ☐ Higher (patient-facing / sensitive data)

Human review step before output is used _____

Date last reviewed _____

Copy the block above for each additional tool.

Review cadence

☐ Inventory reviewed at least every 6 months

☐ New tools go through one intake step before use

☐ Retired tools are removed and access is turned off

This worksheet is an educational planning aid. It is not legal, clinical, HIPAA, cybersecurity, or compliance-certification advice. Consult qualified professionals for guidance specific to your organization.