

AI Policy & Recording Consent Toolkit

A framework for writing an AI policy in your own words, and sample language for asking a client if you can record a visit.

For Aging Life Care Managers® and care management practices · October 2026

Why a written policy

Your clients and their families trust you with their most private information. If AI tools are part of how you work, they'll want to hear about it from you, in plain language.

Standard 14, added in the May 2026 revision of the *Code of Ethics and Standards of Practice for Aging Life Care Professionals*®, says practitioners should use AI transparently and disclose it to clients. It also calls for business policies addressing disclosure, transparency, and privacy.

Ask Standard 14's four questions about each tool you use

1. What tasks are being automated?
2. What business or clinical information is being shared?
3. For what purpose?
4. Who benefits and who might be harmed?

Your answers are the raw material for your policy.

Part 1

Five things a good AI policy covers

Use the questions to decide what's true for your practice. Treat the sample language as a starting point, and put it in words you'd use with a client.

1 What you use and why

- Which tools touch client information?
- What do they help you do?

Sample language

[Practice Name] uses a small number of software tools, some with artificial intelligence (AI), to help with paperwork like drafting notes and organizing records.

2 Who makes the decisions

- Where does a person review what a tool produces before it's used?
- What will you never hand to a tool?

Sample language

A care manager reviews anything an AI tool drafts before it goes in your record or to your family. AI never makes decisions about your care.

3 How information is protected

- What client information goes into each tool?
- Has the company committed in writing to protecting it, for example through a Business Associate Agreement (BAA)?
- Does the company use client data to train its AI?

Sample language

We use only tools from companies that commit in writing to protecting your information, and we never put information that identifies you into free or personal AI tools.

4 What choices clients have

- Can a client opt out?
- What changes for them if they do?

Sample language

You can ask us not to use AI tools with your information at any time. Just tell your care manager.

5 How you'll keep it current

- When will you review the policy?
- How will you tell clients before adding a new tool?

Sample language

We review this policy every year and will let you know before we add a new tool that handles your information.

Part 2

Asking to record a visit

A recording can let you stay present instead of taking notes. But it only works if everyone in the room is comfortable with it.

Principles

Ask once, then keep it current.

A client can say yes to recording future visits, so you don't need to ask every time. Recording laws vary by state, and some require everyone's consent, so ask anyone new in the room. Remind clients they can change their mind anytime.

Make it easy to say no.

Ask in a way that makes declining feel normal, and take notes by hand without comment.

When in doubt, don't record.

If a client may not understand what they're agreeing to, or seems uneasy, skip it.

Know where it goes.

Decide where recordings are stored and when they're deleted, so you can answer when someone asks.

Sample language

Asking your client the first time

"I want to be fully present for our conversation and not miss anything important. Is it okay if I record our visits, starting today? The recording stays private and secure [on my device], and I delete it once my notes are complete. You can change your mind anytime, and it's completely fine to say no."

At later visits

"Is it okay if I record today's conversation like I have in the past?"

When family is present

"I'd like to record today's conversation so I don't miss anything. The recording stays private and secure [on my device], and I delete it once my notes are complete. Is everyone comfortable with that? [Client's name], what do you think?"

Asking the client last, by name, keeps the decision theirs.

At a doctor's appointment

"I'm [client's name]'s care manager. With your permission, I'd like to record the visit so I don't miss any details and can update the family. The recording stays private and secure [on my device], and I delete it once my notes are complete. Is that all right with you?"

If the answer is no

"No problem at all. I'll take notes the old-fashioned way."

If you record, add a line to your policy too:

Sample policy language

We record visits only with your permission. We also ask anyone else present. Recordings are kept private and secure [where you store them] and deleted once notes are complete. You can say no or ask us to stop at any time.

Before you publish

Have an attorney licensed in your state review your final language. Then share the policy with current clients and families, and add it to your intake packet. This toolkit is general guidance, not legal advice.

Source

- Aging Life Care Association®, *Code of Ethics and Standards of Practice for Aging Life Care Professionals*®, revised May 2026, Standard 14: Artificial Intelligence & Practice (members area at aginglifecare.org)



Trying to figure out where AI fits in your practice? **Reach out, I can help.**
Kate Brigham, Founder, Care Clarity (aka *The AI Lady*) · kate@careclarity.ai