

NAMSS Artificial Intelligence (AI) Use Policy

Effective Date: June 11, 2026

Approved By: Board of Directors

Policy Owner: NAMSS AI Task Force

Applies To: All individuals acting for or on behalf of NAMSS—including staff (including Smithbucklin employees staffed to the Association), contractors, volunteers, officers, board and committee members, members, certificants, instructors, authors, presenters, education providers and all other users of NAMSS educational or members-only content.

1) Purpose & Guiding Principles

NAMSS may use AI as a component of its activities to advance its mission, improve member services, and work efficiently—with human accountability, transparency, and respect for privacy, intellectual property (IP), safety, and equity. This policy sets minimum controls for responsible AI use and clarifies what is allowed, restricted, or prohibited.

NAMSS partners with Smithbucklin to promote and train for wide, appropriate use of AI while monitoring for excessive environmental/sustainability impact.

2) Scope

This policy governs all AI tools and capabilities used for Association business including generative AI, summarization and transcription tools, classifiers, recommenders, and embedded AI in enterprise software—regardless of who provides the tool (Association, Smithbucklin, vendors, or platforms).

3) Definitions (abbreviated)

- **Generative AI:** A type of AI designed to produce new content—such as text, images, audio, video, or computer code—by learning patterns from existing information and applying those patterns to respond to prompts or questions. These systems can create content in many forms but may contain errors or bias, so all outputs require human review.
- **Zone of Control:** Technical/contractual environment where Association or Smithbucklin retains control over data access, processing, retention, deletion, and training public models on data.

4) Approved & Supported Tools



- Staff employed by Smithbucklin are provided with the following approved tools for prompting within Smithbucklin's ZONE OF CONTROL:
 1. Microsoft Copilot Chat (simple prompting interface)
 2. A Smithbucklin-managed premium version of ChatGPT for an internal bot/solution marketplace to share vetted prompts and workflows.
 3. Fireflies.ai for meeting minute creation
- Using non-approved tools requires a security/legal review and written exception from Smithbucklin IT.

5) Acceptable, Restricted, and Prohibited Uses

Acceptable:

- Drafting agendas, summaries, emails, content outlines; rewriting for tone/clarity.
- Transcription, note-taking with attendee consent, only as sanctioned by NAMSS staff. Volunteers are prohibited from sending their own AI note-takers to NAMSS meetings.

Restricted (requires approvals/safeguards):

- Member surveys, policy statements, clinical abstracts, or standards proposals generated with AI must include human subject-matter review and disclosure where AI assistance informed the output.
- Any processing of personal, sensitive, or regulated data (e.g., health information) without signed vendor terms, data-minimization, and recorded legal basis.

Prohibited:

- Uploading Confidential/Restricted data to consumer tools or any tool that trains on our inputs.
- Uploading, inputting, or otherwise providing NAMSS-owned education materials to any artificial intelligence (AI) platform, model, or tool for the purpose of creating, training, generating, or enhancing new tools, products, or derivative works. This prohibition applies to all NAMSS educational resources, including but not limited to:
 - Printed and digital course materials
 - Online modules and e-learning content
 - Certification preparation content
 - Webinars, presentations, and slide decks
 - Case studies, assessments, and exam questions
 - Member-only documents, tools, and templates



- Misleading uses (deepfakes, undisclosed ghostwriting, undisclosed synthetic media in advocacy).
- Automated decisions that materially affect safety, employment, credentialing, eligibility, or legal rights without required human oversight and due process.
- Using AI to provide medical, legal, or financial advice to the public without proper licensure, disclaimers, and approvals.

6) Data Classification & Handling

- Restricted: PHI/PII, sensitive member data—do not use in generative AI unless approved terms and controls are in place.
- Confidential: Internal documents—use only in approved tools.
- Internal/Public: Review for accuracy and IP before use.

7) Meetings, Recording & Transcription

- Notification is required: Hosts must notify attendees of AI note-taking or transcription pursuant to a documented standing approval already in place for the group or meeting type [See Annex B].
- Retention: Transcripts/recordings facilitated by Association staff are permanently deleted upon approval of meeting minutes.
- Controls: Use only approved tools; enable participant controls (pause/stop); store within the ZONE OF CONTROL.
- Attendees: Must not use AI for personal notetaking.

8) Transparency & Human Oversight

- Disclose AI use in external content per guidelines in Annex C.
- Human review is mandatory before dissemination of AI generated or AI assisted content.

9) Accuracy, Bias & Safety Controls

- Validate factual accuracy
- Check for bias by reviewing outputs to identify and address unfair or prejudiced treatment of individuals or groups based on attributes such as race, gender, age, or other protected characteristics, and take steps to correct or reduce any such issues before using or sharing the content

10) Intellectual Property



- Ownership: AI-assisted works created by staff within scope of duties are Association works (or “work-made-for-hire,” as applicable). Any fully/mostly AI-generated work cannot be Association works, they are public domain.
- Third-party content: Do not paste proprietary text or datasets into tools without authorization.
- Training data: Vendors must warrant that our inputs are not used to train foundation models and that outputs do not knowingly infringe third-party IP.

11) Privacy, Security & Vendor Requirements

- Vendors and platforms must provide:
 - No training on our data; segregation of customer data; data residency as needed.
 - Shall implement and maintain cybersecurity protections that meet or exceed industry standards and are reasonably expected of any vendor entrusted with handling Association data
 - For health data: compliance with HIPAA and, where applicable, BAAs.

12) Resolving Compliance Overlaps

- Where Association bylaws, committee rules, accreditation requirements, grant terms, law, sector-specific regulatory compliance requirements, or Smithbucklin policies including but not limited to Data Privacy and Protection Policy, Information Security Policy, and Records Retention Policy conflict with this policy, the stricter rule applies. The Policy Owner coordinates with Legal to document the controlling requirement and communicate the decision.

13) Training & Enablement

- Smithbucklin will provide onboarding and periodic refreshers on safe prompting, data handling, disclosure, and sector-specific risks to employed staff.

14) Incidents, Reporting & Enforcement

- The Association’s Board of Directors reserves the right to suspend access to generative AI tools and to mandate corrective actions in the event of a suspected incident, such suspension and corrective measures to remain in effect pending the outcome of an investigation.
- Injunctive relief: Nothing in this policy limits the Association’s rights to seek injunctive relief or remedies available under law, contracts, or bylaws [insert link/reference].

15) Exceptions



- Exception requests must be submitted in writing (purpose, data, tool, controls, duration).
- Policy Owner, with Legal/Security, may grant time-bound exceptions with compensating controls.

16) Review Cycle

- This policy will be reviewed at least annually and updated to reflect changes in AI technology, law, standards, and organizational needs.

Annex A — Sector Addenda

- No PHI in generative tools unless the environment and contracts explicitly support HIPAA compliance; de-identify by default. [HHS.gov](https://www.hhs.gov)
- AI outputs must not replace clinical judgment; treat as decision support with documented human validation.
- CME/CE materials: disclose AI involvement; perform bias/accuracy review by credentialed SMEs.
- Require reproducible references, test vectors, and transparency about any AI-generated artifacts entering balloting.

Annex B — Meeting Transcription Consent (Template)

Single Meeting Consent Version: "This meeting may use AI transcription/notetaking to aid accuracy and action tracking. By remaining in the meeting, you consent to transcription. The transcript will be stored securely to be used by AI to create the minutes and then deleted once the minutes are approved. You may request transcription be paused or stopped at any time."

Standing Consent Version: "By participating in meetings of this group, all members and attendees hereby provide standing consent to the ongoing use of AI transcription/notetaking for the purposes of creating accurate records and tracking action items. Transcripts will be stored in [system] for [retention period] and shared with [audience]. This standing consent shall remain in effect until revoked in writing by the Association's Board of Directors.

Annex C — Disclosure Examples

- Co-Created with AI, Human Approved
Content created through human-AI collaboration, with human review and approval.
- AI Generated, Human Approved
AI-generated content with human review before publication. Human accountability is not removed.



- **AI Generated**
Automated AI responses for low-risk scenarios, such as guided chatbots built with specific data.