Ontario Medical Association

Effective Date: January 2026
Review Date: January 2027

Workplace Use of Artificial Intelligence

1. PURPOSE

As artificial intelligence (AI) technologies continue to evolve and become integral to daily operations, this policy establishes guiding principles for their reasonable, safe, secure, and ethical use in the workplace. The goal is to ensure that AI tools are leveraged to enhance productivity while upholding trust, transparency, and privacy.

2. SCOPE

This Policy applies to all "OMA Participants", which is defined to include all employees, members, affiliates, visitors, students/interns, volunteers, and contractors, as well as any directors and officers of the corporation and/or its subsidiaries who use AI technologies during their OMA work.

3. DEFINITIONS

AI tools are software, applications, or systems that use artificial intelligence to perform tasks that usually require human thinking. These tasks can include understanding language, recognizing patterns, making predictions, helping with decision-making, and assisting with documentation of meetings or conversations. AI tools may also help with problem-solving, researching ideas, drafting content, creating summaries, and identifying action items.

Examples of AI tools include:

- **AI scribes**, which capture and document spoken interactions such as meetings or conversations.
- **Chatbots**, which provide automated responses and support through text or voice interactions.
- **AI meeting assistants**, which can join meetings virtually to capture discussions, organize key points, and generate summaries or action items.

Approved AI Tools are technologies that have passed OMA's privacy, legal, and cybersecurity review and received written approval from Technology and Legal Services for business use.

4. POLICY STATEMENT

This policy sets out clear guidelines so we can use AI tools in a safe, secure, consistent, and responsible way. Our goal is to make the most of AI to support our work while protecting trust, being open about how we use it, and keeping information private.

New **AI Tools** should be acquired through OMA's normal procurement process, even if they are free to use or added as features to existing applications. Free tools often include license agreements with terms that may not protect the privacy and security of data and may explicitly allow data to be shared with third parties. The procurement process ensures a full review of contractual terms to maintain security, confidentiality, and privacy. **AI Tools** that have gone through this process are **Approved AI Tools**, as defined above.

OMA recognizes that employees may encounter new AI tools or features in the course of their work. These tools must never be used for confidential business information or personal information unless they have been formally approved.
All use of AI under this policy must always align with applicable laws, other organizational policies, and established confidentiality and privacy standards.

To protect privacy and security:

i. Only use **Approved AI Tools** when handling confidential business or personal information. Confidential business or personal information means any private details about the organization or an individual that should not be shared publicly.

ii. Do not use unapproved third-party **AI Tools** for confidential work. Never enter confidential business or personal information into an **AI Tool** that was not approved for such use.

iii. Some **AI Tools** are considered unsafe for use on OMA computers without specific approval. You may find that access to some web tools is blocked on OMA systems due to an automated risk assessment. Contact Technology if you believe the tool is safe and required for your work. Not all high-risk tools will be blocked, so good judgment is required.

iv. Applications used for one purpose may sometimes offer additional **AI Tools**. Such features, even when free or suggested by the application, must not be used for confidential work without prior approval from Technology.

5. PROCEDURE

Meetings

i. Consent

Ensure everyone present at a meeting is aware if it is being recorded, transcribed, or summarized, with or without AI. If AI summaries or other specific tools are being used to keep a record of the meeting, this should be noted, along with how attendees will be

provided with an opportunity to review the transcript and summaries. If someone declines to consent, consider whether the recording or transcription is necessary for the meeting in question. Be aware that in some meeting applications, transcription may be automatic. You should attempt to be aware of this and inform the group if reasonable.

Ideally, the intention to record a meeting is provided in advance so that any objections can be resolved offline and not at the commencement of the meeting. Consider adding language around the intention to transcribe a meeting to all meeting invitations.

ii. Intended Use

Do not apply recording or AI tools without a clearly stated purpose (e.g. to provide a summary to attendees, to keep a record for future reference, to provide to those who cannot attend) and consider whether the use of AI tools will support the purpose. For example, where the focus is brainstorming and innovation, participants are less likely to engage in open-minded, creative, or honest discourse if they are aware they are being monitored.

In general, AI tools should not be used as a substitute for attending meetings in person. Under limited circumstances, it may be appropriate to rely on recordings, transcripts, and AI summaries to promote engagement where attendance is not possible after careful consideration of the importance of attendance and scheduling difficulties. If an AI Meeting Assistant or scribe attends from an external party, you should verify that this is attached to a person in attendance. Otherwise, the AI attendee should be removed.

iii. Output Quality & Retention

Automated transcriptions are often able to capture dialogue and AI tools create compelling summaries, but they should not be relied upon as an official record of a meeting without review and acceptance by the members of a meeting.

Circulate transcripts and summaries to those who were present. This gives attendees the opportunity to add context to statements made or correct summarized information.

Monitor for quality assurance. If the summaries of the meetings are not an accurate representation of what was said, consider switching to a different tool.

Set reasonable retention and destruction timelines, based on identified business requirements, for recordings and transcripts and ensure this is communicated to meeting participants. Commonly, this would not exceed 30 days for recording and transcripts, but summaries can be retained indefinitely.

Work Products
AI tools may be used to assist with research or final work product(s). You are not required to inform your audience that you have used AI in your process, however you are ultimately responsible for the content and verifying the accuracy of all information and citations. Where citations have traditionally been required (e.g. research involving journal articles), these continue to be required, and you should verify all work and citations used.

OMA participants who do not follow this policy may be subject to corrective measures. Repeated or more serious violations will be addressed at the OMA's discretion, based on the nature and frequency of the issue.

Questions about specific ethical or compliance issues should be directed to your immediate supervisor or Human Resources.

6. SUPPORTING/REFERENCED DOCUMENTS

Use Type	Document Title
Mandatory	Privacy Policy Information Security Policy Third-Party Risk Management (TPRM) Policy Data Loss Prevention Policy Information Confidentiality Policy IT Access Control and User Access Management Policy
Legislation	

7. RESPONSIBILITIES

Position	Actions
CEO	Approve operating policies and/or procedures. For escalated cases, confirm the validity of the allegation and determine the course of action to resolve the issue.
Process Owner/Author	Communicate this policy to all OMA Staff and ensure OMA Staff understand the standard of conduct that is expected of them. Enforce and reinforce acceptable conduct. Provide guidance and interpretation on components of the Code and any other OMA policies, procedures, and applicable laws. Executive Vice President, People & Culture, will investigate the validity of any allegations, determine a course of action to resolve the issue and escalate the allegation to the appropriate level, if necessary.
Knowledge & Records	Review and provide additional metadata as required. Publish to StaffSpace. Notify Authoring Department when each policy reaches its review date. Maintain original documentation for archiving.

Department Directors	Communicate expectations contained in this policy to all OMA Staff under their supervision and take necessary steps to ensure employees and volunteers conduct themselves in an appropriate manner. Monitor compliance with this policy by OMA Staff. Respond promptly and impartially to incidents that transpire. Obtain training for OMA Staff if required.
OMA Staff	Read, understand, and agree to adhere to the contents of the Code. Acknowledge as required and comply with all OMA policies/procedures. Communicate any concerns with their supervisor or Human Resources.

Author: **Legal Services**
Process/Service Owner: People & Culture

Approved by: Chief Executive Officer

_____ January 16, 2026_____
Signature Date