

Minimum-data task worksheet

Healthcare privacy officers and staff-use policy owners

[Read the complete guide on aona.ai](https://aona.ai)

For an otherwise permitted AI use, identify whether HIPAA's minimum necessary standard applies, then limit the information to what the task needs. The standard has exceptions, including disclosures to or requests by healthcare providers for treatment. An AI subscription does not itself establish an exception.

An invented clinic reviews three staff tasks after separately approving their destination and purpose. The selections illustrate minimisation reasoning, not permission to disclose real PHI.

Synthetic administrative examples. No actual patient record, legal approval or control test is represented.

Your review

Reviewer: _____ Date: _____

Organisation or team: _____

☐ Confirm purpose and recipient

Identify the otherwise permitted use or disclosure before applying this worksheet.

☐ Resolve applicability

Record the relevant minimum-necessary rule or exception without treating all clinician AI use alike.

☐ Justify included fields

For each field, explain what the approved task cannot accomplish without it.

Checked items record your review, not a compliance approval or an installed-product test result.

Notes and next actions

Decision and scope: _____

Evidence to collect: _____

Owner and next review date: _____

Review matrix

Task	Keep for the example	Omit or review	Reason
Rewrite a generic appointment reminder	Clinic's public contact instructions and neutral wording.	Names, booking date, diagnosis and patient list.	The wording task can be completed without an individual's record.
Explain an approved payment exception	Only the transaction facts needed for the defined question.	Unrelated diagnoses, other patients and complete chart.	A billing question does not justify unrelated clinical context.

Task	Keep for the example	Omit or review	Reason
Review an unusual disclosure request	Purpose, recipient and a proposed field list for internal review.	Do not upload the full record while the criteria are unresolved.	Non-routine requests need the organisation's individual review.
New attachment added to a routine task	Recheck that attachment against the protocol.	Hidden or unrelated rows, comments and extra records.	The protocol applies to what is actually sent, not only the prompt title.

A smaller input starts earlier

- **Purpose:** Improve reminder wording
- **Necessary context:** Public reception instructions
- **Omitted:** Patient identity, diagnosis and booking export

Safe reminder fixture

Please improve this generic wording: "Contact the clinic reception team if you need to discuss a booking." Preserve the meaning and do not invent patient details.

Example decision

The wording task needs no patient list. Use the generic fixture. This example does not establish approval of any external AI service. For a real case, retain the applicable protocol and accountable decision.

Sources and scope

Sources checked 2026-09-21. Review the current requirements and your actual agreement before using this workbook for a real decision. General information; no professional approval or installed-product result is represented. It does not decide HIPAA exceptions, permitted disclosures or the clinical necessity of a field.

[HHS: Minimum necessary requirement](#). Reasonable minimum-necessary measures, exceptions, routine protocols and individual review of non-routine requests.

[HHS: Guidance on HIPAA and cloud computing](#). Business-associate roles, BAAs, risk analysis and cloud-service safeguards, including providers without decryption keys.