

HOME CARE AGENCIES

AI Use Policy & ChatGPT Business Setup for Home Care Agencies

Move staff AI use from personal accounts into a company-managed workspace, with clear non-PHI rules, training, and practical workflows.

Presented by

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The reality: staff are already using AI

This is no longer a future issue. It is already happening inside everyday office work.

Common real-world uses

- Drafting messages
- Organizing rough notes
- Summarizing documents
- Creating training language
- Improving wording
- Translating drafts

The agency question

Not whether staff will use AI.

The question is whether the agency has a professional way to manage that use.

The first move

Bring AI use into company accounts.

Create clear rules.

Train staff before habits become normal.

The personal-account problem

When company work happens in personal AI accounts, company information can move outside company control.

What may be uploaded

- Policies
- Procedures
- Training materials
- General care-plan wording
- Internal checklists
- Office documents
- Communication drafts

Why it matters

The employee may be trying to work faster, but the agency may not know what was entered, what rules were followed, or what stays tied to that employee's personal account.

The goal is not to leave AI use to individual staff judgment. The goal is to set a clear professional standard.

The professional step: ChatGPT Business

Move useful AI activity into a company-managed workspace.

1

Company email access

Move AI use from personal accounts to approved company accounts.

2

Admin-managed seats

You decide who can use it.

3

Business workspace protections

Keep agency work in the company workspace, not in personal ChatGPT accounts.

4

Clear agency standard

Agency work should be done through approved company accounts, with clear rules for staff.

What changes

Instead of scattered personal accounts, the organization can create a business workspace, invite the right users, manage access, and train staff on appropriate AI use.



From unmanaged use to professional use

Appropriate non-PHI use cases

Start with administrative work that does not include patient-identifying information.

Caregiver onboarding and training materials

SOPs, policies, and internal checklists

Intake scripts and follow-up language

General care education templates

Office email and communication drafts

Multilingual drafts, with human review

Reviewing non-patient-specific documents for clarity, gaps, and consistency

Practical standard

Use AI to improve wording, structure, clarity, and consistency. Keep final review with people.

What staff should not enter

The simple rule: protect patient and client information.

Do not enter

- Patient names
- Dates of birth
- Addresses or phone numbers
- Medicaid, insurance, or billing identifiers
- Medical details tied to a specific person
- Incident reports with identifiable information
- Any other protected health information

Safer approach

Ask for general language, templates, checklists, training material, or document review without including patient-identifying information.

Then have a qualified person review before use.

Metaverde.

OPENAI SMB CHANNEL PARTNER

What Metaverde provides

A practical rollout package for home care office teams.

Setup guidance

Workspace setup and sign-up path.

AI usage policy

Clear rules for non-PHI use.

Staff training

Office, admin, and care coordination teams.

Prompt examples

Reusable prompts for common workflows.

Document workflows

Review non-patient-specific docs.

Human review standard

People remain responsible for final review.

Positioning

This is not legal, clinical, or regulatory advice. It is a practical business rollout for professional AI use, policy awareness, and staff training.

Example workflows for home care offices

Simple ways staff can use AI without entering patient-identifying information.

Policy review

Review this non-patient-specific policy for clarity, gaps, and inconsistent wording.

Training handout

Create a caregiver training checklist based on this general topic.

Care education

Write a general fall-prevention education note with no patient details.

Email draft

Turn this rough internal note into a clear office email.

Translation draft

Translate this general agency message into Spanish for staff review.

Checklist creation

Convert this procedure into a step-by-step checklist.

A simple rollout plan

Start small, make the rules clear, then expand.

1

Assess

Identify how staff are already using AI and where the agency needs guardrails.

2

Setup

Create the business workspace and invite the right initial users.

3

Policy

Put clear non-PHI rules and human review expectations in writing.

4

Train

Train staff on safe prompts, uploads, and practical workflows.

5

Expand

Add users and workflows only after the standard is understood.

Possible promotional offer

A practical reason to start through the correct OpenAI SMB Channel Partner link.

Eligible businesses may see a first-seat promotion

When using the appropriate OpenAI SMB Channel Partner link, eligible businesses may see a promotional first-seat offer. Availability may vary by country, region, and eligibility. The offer should be confirmed at sign-up or checkout.

Why still work with Metaverde?

The link starts the account.

Metaverde helps with the professional rollout: setup, policy, staff training, safe workflows, and practical adoption.

Start with the correct link

Start with an AI readiness conversation

The fastest next step is simple.

For agency leaders

If your staff are already using ChatGPT, move from informal use to a company-managed standard.

Request

ChatGPT Business link

AI use checklist

Setup guidance

Contact

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metaverde.com/homecare-ai

[Request ChatGPT Business Link](#) | [Book a 15-Minute Readiness Call](#)

Important notes

Let's start a practical business conversation.

Scope

Metaverde helps organizations think through practical AI usage policies, staff training, non-PHI workflows, and company-managed ChatGPT Business adoption.

This presentation is not legal, clinical, billing, regulatory, or HIPAA advice. Healthcare organizations should follow their own policies and consult qualified advisors when needed.

OpenAI and ChatGPT names are used descriptively. Metaverde, LLC is an OpenAI SMB Channel Partner. Metaverde does not speak for OpenAI or guarantee OpenAI approval, access, eligibility, pricing, promotions, or outcomes.

Thank you