

Module 7

WEO AI Rules

Read 10 min · Mandatory before real client work

Why This Module Exists

WEO is a dental marketing agency. Three things are always in play:

1. **HIPAA** — clients' patients have PHI; adjacent info can still be sensitive
2. **Client trust** — brands, unreleased campaigns, strategy
3. **Regulatory framework** — FDA digital health, ADA accessibility, CA AB 3030, CCPA/GDPR, ISO/IEC 42001:2023

The rules below keep you — and the agency — on the right side of all three.

The Top 5 Don'ts

1. **Don't paste PHI or patient-identifying info**
2. **Don't generate medical advice or unsupported treatment claims**
3. **Don't generate fake reviews, testimonials, or before/after imagery**
4. **Don't use unapproved tools or enable connectors without approval**
5. **Don't mix client data across accounts**

Full policy: [\[\[weo-ai-governance/ai-policies\]\]](#)

Don't #1 — No PHI

Unsafe:

| *"Write a case study about Jane Doe (patient ID 12345) who had Invisalign treatment at [practice name]."*

Safe:

| *"Write a blog about how orthodontic treatment helps adult patients."*

No names + conditions. No appointment records. No patient photos. Dental client EHR data never enters Claude. Ever.

Don't #2 — No Medical Claims

Unsafe:

| *"Write content stating dental implants are 100% permanent and never fail."*

Safe:

| *"Explain how dental implants work in plain language."*

Claim-making = clinician territory.

Don't #3 — No Fake Content

⚠ Severe violation under WEO policy.

- No AI-generated patient testimonials
- No AI-modified before/after photos
- No fake quotes

Could trigger immediate action.

The Top 5 Do's

1. **Disclose AI usage to clients** — WEO requires transparency
2. **100% human review** on every AI output — 3-stage content review
3. **Classify before you paste** — 4-level WEO data classification
4. **Follow tool + account guidance** — Team/Reimbursed/Personal tiers
5. **Ask the AI council when unsure** — using it is strong judgment, not weakness

Data Classification

Before you paste **anything** into Claude, ask: *"What level is this?"*

Level	Type	Claude.ai OK?
1 — Public	Published content, marketing	✓ Yes
2 — Internal	Internal comms, employee stuff	✓ Generally (check with mgr for sensitive)
3 — Confidential	Client strategies, financial data	⚠ Approved client Projects only — ask
4 — Restricted	PHI, payment info	✗ Never

If unsure → assume higher, ask the council.

Three-Tier Usage Model

- **Tier 1 — Experimental (sandboxed)** — learning, personal productivity. Synthetic data. Low bar.
- **Tier 2 — R&D (internal)** — internal agency work, non-client-facing. Higher bar.
- **Tier 3 — Production (client-facing)** — reaches a client or audience. **All rules apply.**

Most of this course = Tier 1. Real client work = Tier 3.

Try It (5 min — no Claude required)

1. Open [\[\[weo-ai-governance/ai-policies\]\]](#) end-to-end. Read it once — better than guessing later.
2. Write down three scenarios from your recent work where these rules apply:
 - *"Last week I pasted a client SEO audit — was that Level 2 or 3?"*
 - *"Client asked for a patient success story — how without fake testimonials?"*
 - *"Found a new AI tool on LinkedIn — what's the approval process?"*
3. Unresolved questions → **AI council.**

Next: Module 8

Keep Learning