

HPNA Working Guidelines for the use of Generative AI

Overview

HPNA (Association) established these Working Guidelines for the use of Generative AI to ensure ethical, transparent, and responsible use of artificial intelligence (AI), including generative AI tools.

These are working guidelines and meant to direct the organizational use of AI, specifically generative AI, by the Association's volunteers, members, presenters, employees, contractors, and vendors. Common AI resource deployment within the enterprise may include reviewing, editing, or creating content for the Association, including technical documents, training manuals, reports, bulletins, conference materials, webinars, newsletters, articles, and other publications and materials. These guidelines will be reviewed annually and amended as needed to address both the potential and challenges of these new tools.

These guidelines **do not apply** to nor restrict the use of the AI components of common software tools, such as Microsoft Word and Outlook (i.e., spelling and grammar check).

Understanding Generative AI

Generative AI, including Large Language Models (LLMs) like ChatGPT, Claude, Dall-E, Copy.ai, Bard, and Microsoft Copilot, refers to a category of AI models and techniques that use massive datasets and are designed to generate new content, such as text, images, music, or videos. These models are trained to understand patterns and structures in the data they are exposed to and then generate new content that is similar in style or format. Generative AI can significantly enhance creativity, productivity, and operational efficiency but should not be seen as a replacement for human judgment and expertise.

AI tools and resources are evolving rapidly in the setting of minimal to no regulation. Challenges involving the use of AI include, but are not limited to:

- Accuracy of generated content
- Source transparency
- Intellectual property rights
- Potential bias(es)
- Data/information privacy

Like all technology, generative AI is a tool. The Association is responsible for the outcomes of these tools. For example, if autocorrect unintentionally changes a word and, therefore, changes the meaning of something the Association staff wrote, the Association staff is still responsible for the accuracy of the text. Technology enhances the work of the Association; it does not excuse human judgment nor human accountability.

Guideline

Data Security and Privacy

The Association's intellectual property or proprietary, sensitive, or confidential information ("the Association Information") may not be uploaded into or shared with any AI prompts or AI platforms. Individuals utilizing AI for the benefit of HPNA should always opt out of machine learning data usage wherever possible.

Association-related personally identifiable information (PII) should never be entered or uploaded into any AI prompts. PII is any information that identifies a specific person including, but not limited to, date of birth, social security number, name, physical or email address, or phone number.

Sharing the Association Information or PII with generative AI platforms is a security risk, compromises the Association's rights and ownership in and to such information, and breaches confidentiality. Once Association Information is shared with a generative AI platform, the platform learns from it, shares it with others, and incorporates it into its database. Sharing the Association Information undermines the Association's ability to protect and control its information.

The Association Information includes, without limitation, its educational content and materials, articles, technical documents, publications, data, financial statements and other financial information, contact lists, membership information/records, donor, sponsor, exhibitor and supplier lists, minutes, agendas, strategic plans, webinar materials, conference presentations, survey data, abstract submissions, and any other information or materials that the Association considers proprietary, confidential, or sensitive.

Use of AI During HPNA Board Meetings, HPNA Board Committee Meetings, and Annual HPNA Membership Meetings

Use of generative AI in connection with the Association meetings destroys the confidentiality of such meetings and creates the risk that potentially confidential or sensitive information will be publicly disclosed. Moreover, its use may have negative legal consequences and jeopardize important legal protections.

Generative AI (including, but not limited to, tools used for notetaking, recording, transcription, attending, summary generation, as well as similar technologies) **may not** be used to record, transcribe, or summarize HPNA Board meetings, HPNA Board Committee meetings, or annual HPNA membership meetings in whatever form or format held (i.e., in-person, conference call, videoconference, etc.).

Audio, video, or other recordings of HPNA Board meetings, HPNA Board Committee meetings, or annual HPNA membership meetings (including an attendee's notes) **may not** be uploaded into generative AI to produce a transcript or summary of the meeting (either during or after the meeting). Minutes of a meeting remain the sole official business record of the meeting.

Exceptions: Educational/training sessions and other informational presentations may be recorded upon the direction of the Chief Executive Officer (CEO) or their designee(s). Additional exceptions to these guidelines for ADA-related requests or other accommodation may only be made with the CEO's prior written authorization.

AI Notetaking Use by HPNA national office committees and staff

Please note: AI notetaking guidelines listed in this section do not apply to HPNA Board meetings, HPNA Board Committee meetings, or annual HPNA membership meetings. The use of AI notetaking for HPNA Board meetings, HPNA Board Committee meetings, or annual HPNA membership meetings is addressed in the prior section.

The following AI notetaking guidelines apply **only** to HPNA national office committees and internal staff departmental and/or project planning meetings. AI notetaking is not permitted during supervisor/direct-report 1:1 meetings or during annual employee evaluations.

AI notetaking guidelines

- Only AI notetaking tools approved by HPNA's IT department may be used.
- All meeting participants must be informed when AI notetaking tools are being used.
- Consent must be obtained from meeting participants before using AI tools to capture meeting notes.
- Participants must be allowed to opt out of being recorded. If someone opts out, alternative arrangements must be made.
- All AI-generated notes must be reviewed and verified for accuracy. Errors or inaccuracies must be corrected before being distributed to meeting attendees.
- AI-generated notes may not be shared with unauthorized individuals.
- Committee chair and/or committee staff liaison must complete proper-use training of AI notetaking tools.
- Retention periods for AI meeting transcriptions should align with HPNA's data retention policy.

For Education Content Creators and Internal Staff

Works subject to copyright (such as technical documents, manuals, white papers, bulletins, articles, chapters, newsletter articles, presentations, abstracts, webinars, etc.) created for publication, dissemination, or other use by the Association (collectively, "Publications") **may not** be created by using, or with the assistance of, AI (i.e., ChatGPT, Microsoft Copilot, or other AI system or chatbot) to create the primary content. AI (i.e., ChatGPT, Microsoft Copilot, or other AI system or chatbot) can be used to improve language clarity and

readability, create outlines, generate thought ideas, and create pre- and post-program questions.

It is important to the Association's work that it owns the copyrights in and to most (if not all) of its Publications. Under current copyright law, works created by non-humans, including machines, are not eligible for copyright protection.

Internal Staff

Internal staff may use the **AI Assistant/Rise Articulate** closed platform (or a related closed AI resource) to create subject outlines, pre- and post-program questions and answers, and generate thought ideas. Internal staff are responsible for the accuracy and integrity of the contents of the work. They are also responsible for having subject matter experts review and confirm the accuracy of the outlines and pre/post questions. AI must not independently determine or substantially influence primary conclusions or original insights. All generations are required to maintain human oversight, and content creators must review all outputs to avoid incorrect, incomplete, or biased outputs. Content creators and internal staff are solely responsible for the accuracy and integrity of the contents of the work. Content creators and staff are also solely responsible for the originality of the work, including ensuring the work does not infringe the intellectual property rights of any individual or entity.

Content Creators

For purposes of these guidelines, "content creator" refers to the individual(s) responsible for the final structure, substantive content decisions, and intellectual contribution of the work. AI tools (including, but not limited to, ChatGPT, Microsoft Copilot, Rise AI Assist, or other AI systems or chatbots) **may not be used as the sole or primary content creator of final publishable content.**

Artificial intelligence tools **may be used in a supportive and assistive capacity**, including, but not limited to:

- Generating outlines or structural frameworks
- Brainstorming ideas, learning objectives, or instructional approaches
- Adapting content for diverse learner needs or instructional formats
- Improving clarity, readability, tone, and grammar
- Drafting preliminary or working content that is **substantially reviewed, edited, and finalized by a human author**
- Creating pre- and post-program questions or assessments

Use of AI tools must **not compromise educational integrity, learning outcome alignment, or accreditation standards.** All Publications must undergo human review and editorial oversight to ensure originality, accuracy, accreditation compliance, and adherence to applicable copyright laws.

For transparency, all AI-generated text or text prepared by content creators with the assistance of AI requires explicit disclosure, including the tools and versions used. **(See Addendum)**

These guidelines refer to the writing process, and not the use of AI tools to analyze and draw insights from data as part of the research process. Content creators must submit documentation to HPNA to confirm when generative AI resources were used in their work product.

General Principles for Content Creators:

- **Transparency:** Disclose AI assistance (e.g., ChatGPT, Copilot, Gemini, Claude) explicitly, including the names of the tools and how they were used.
 - Include the version and type of model used (e.g., Open AI's ChatGPT 3.5 versus Google's Bard).
 - Document how the AI tool was used, for example include the prompt(s) used in the use of AI.
 - Include a reference as a footer to the fact that generative AI was used.
 - Sample credit line: "This description was generated by ChatGPT 3.5 and edited by Sue Smith, RN, and/or HPNA staff."
- **Accountability:** Human contributors retain responsibility for content accuracy and integrity. Ensure that AI-assisted materials are accurate and do not mislead audiences.
- **Ethical compliance:** AI usage must avoid biases, inaccuracies, plagiarism, or misrepresentation.
- **Review:** Review and verify AI-generated content thoroughly. The content creator and/or internal staff are responsible for the accuracy of all content. AI must not independently formulate primary conclusions.
 - Generative AI can rapidly produce clear prose; however, the information and content might be inaccurate, outdated, or simply made up. It is the responsibility of the content creator and/or internal staff to verify that the information is accurate by independently researching claims made by AI.
 - Content creators should review AI resources for:
 - Inaccurate information, including links and references to events or facts.
 - Bias in the positions or information. Evaluate how historically marginalized groups (including racial and ethnic minorities, women, non-binary individuals, people with disabilities, and others) are portrayed.
 - The HPCC/HPNA style guide should be used as a resource for the appropriate use of language.

Image Creation and Editing

Generative AI may be used to create artwork and images provided that the artwork is clearly labeled as AI-generated, including attribution to the specific AI tool and version used. If AI is used to create artwork and images, the content creator is responsible for the originality of the work, including ensuring the work does not infringe the intellectual property rights of any individual or entity.

The following guidelines must be followed by all content creators and internal staff:

- Any use of AI assistance (e.g., ChatGPT, Copilot, Gemini, Claude) in image or video creation or video editing, must be disclosed, including the names of the tools and how they were used.
 - Include the version and type of model used (e.g., Open AI's ChatGPT 3.5 versus Google's Bard).
- The prompt(s) used in the creation of AI-generated images must be retained and documented by the content creator.
- A reference must be included as a footer to the fact that generative AI was used.
 - Sample credit line: “This image/video or video editing was generated by ChatGPT 3.5. It was reviewed by Sue Smith, RN, and/or HPNA staff.”
- Content creators and internal staff must ensure that AI-created or altered images do not misrepresent data or findings.
- Any AI-created or altered image used on behalf of the association is required to be reviewed and approved by the Association’s marketing department prior to use/publication.
- Association images created using AI should not include trademarked text/images, copyrighted text/images, celebrity names/likeness, well-known images, or popular fictional characters in original input that prompts the AI resource/tool to produce an AI-created image. Original images used for AI prompting must be retained, and any AI-based modifications must be documented.

Data Analysis and Interpretation Within Research

These guidelines do not prevent the use of AI and AI-assisted tools in formal research design or research methods (i.e., for data acquisition or analysis). Where AI or AI-assisted tools are used in this context, they must be explained and described as part of the methodology of the work, including how the tool was used, the name of the model or tool with version number, and the tool creator.

- **Guidelines:**
 - Disclose the use of AI tools in data analysis, including the tools’ names and versions.
 - Ensure that AI-assisted analyses are validated by human experts.
 - Provide sufficient methodological details to allow reproducibility.
- **Reference review and management**
 - AI tools may assist in identifying relevant literature but should not replace comprehensive literature reviews.

- Verify all references suggested by AI for accuracy and relevance.
- **Data input standards**
 - Only use data that is ethically sourced, anonymized, and compliant with privacy regulations as an input for AI tools.
 - Content creators must not input copyrighted, proprietary, or third-party content into generative AI systems unless explicit consent or licensing has been obtained and documented.
 - Maintain records of data used in AI tools for accountability.

For Reviewers

Generative AI or AI-assisted technologies may not be used by reviewers to assist in the review of the Association's Publications. When an expert is invited to review another researcher's work, the work must be treated as a confidential document. Reviewers must never upload drafts, manuscripts or related materials into AI tools. Doing so may breach confidentiality, violate intellectual property rights, and compromise the integrity of the peer-review process. In addition, reviewers are responsible and accountable for the content of the review. **(See addendum)**

Quality Control and Due Diligence

The Association **does not** rely on the accuracy of AI-generated content. The Association is required to carefully review AI-generated content before it is deployed to prevent costly mistakes, embarrassing outcomes, and reputational damage. AI-generated content is known to frequently be plagiarized, biased, and/or inaccurate. The Association should always use outside sources for verification and ensure the accuracy and authenticity of all content. All public-facing interactions of the Association must involve human engagement to maintain personalized, accurate, and empathetic connections. The exceptional level of service provided by the Association cannot be replaced by AI.

The Association does not Does Not include trademarks, copyrighted text, celebrity names, well-known images, or popular fictional characters in AI inputs that prompt AI to create some form of work product.

Using prompts that reference someone else's intellectual property or notable names can lead to results that incorporate such content. If those results are then published or used by the Association, such incorporation might expose the Association (and the content creator) to claims of copyright infringement, trademark infringement, or rights of publicity violations. In the creation of summaries, existing publications or source materials may be referenced; however, **verbatim copying from source material is not permitted.**

Any work that is prepared using AI or AI-assisted technologies must include a disclaimer disclosing such AI use. Disclosing the use of these technologies supports transparency and trust between the public, volunteers, and members and facilitates compliance with the terms of use of the relevant tool or technology.

AI Guidelines Violations

Non-compliance will be referred to the CEO and Board of Directors for potential disciplinary or other actions up to and including retraction, rejection, suspension of privileges, sanctions, expulsion, or reprimand. The Association reserves the right to investigate guidelines breaches thoroughly, including requesting materials as outlined in the above guidelines.

Questions

AI is a rapidly developing technology. If there is ever a question about how generative AI may be used within the Association or the interpretation or application of these guidelines, please contact the Association's CEO.

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Considering the rapid advancements in AI technologies and evolving laws, these guidelines will be reviewed annually and updated as needed by the Association.

Addendum

HPNA Education may use AI to improve efficiency while ensuring content remains evidence-based and clinically sound.

This form is to be completed by all HPNA subject matter experts—including, but not limited to, conference/webinar/workshop presenters, chapter authors, book editors, and guide developers—and volunteers serving as reviewers for any independent product review or HPNA education review committee or task force.

1. Use of AI Tools

Did you use AI, a language model, machine learning, chatbot, or similar technologies to create, assist with creating, editing any part of your content, or to assist you while conducting your review (e.g., text, tables, figures, video)?

Note: This does not include basic tools used solely for checking grammar, spelling, or references.

2. If “Yes,” please provide the following:

- A description of the AI-generated content included or created with the assistance of such tools, along with the name of the model or tool used, its version and extension numbers, and the manufacturer.
- The prompt used for the AI-generated content.
- Confirmation that you take full responsibility for the integrity and accuracy of any AI-generated content you used and that you have disclosed all required details regarding the model or tool, including its version, extensions, and manufacturer.

Reminder: HPNA AI guidelines prohibit entering any portion of HPNA copyrighted content into a chatbot, language model, or similar tool.

3. Attestation

I remain fully responsible for the accuracy and integrity of all content in my submission or review.

References

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