

AI Task Triage

Sort a proposed AI task by data sensitivity, error impact, and human review.

USE THIS WHEN

Use this before putting work into an AI system. The goal is a clear task boundary: what data may be used, what output is useful, and who must check it before anyone acts on it.

THE METHOD

- 1

State the task
Write the input, requested output, intended audience, and permitted tool.
- 2

Check the data
Remove or mask private, confidential, or regulated information unless the tool and authorization allow it.
- 3

Rate the consequence
Ask what happens if the answer is wrong, incomplete, or sent to the wrong person.
- 4

Set the review gate
Define the human checker, source of truth, and prohibited autonomous action.

WORKED EXAMPLE

Candidate task	Draft a generic appointment reminder from approved wording
Data rule	Use a placeholder name; add recipient details outside the AI tool
Failure impact	Wrong time would confuse a customer
Gate	Staff checks schedule, recipient, and final wording before sending

WHEN THE METHOD BREAKS

If you cannot name an approved tool, data boundary, source of truth, and reviewer, hold the task. Do not paste the live data to find out whether the task works.

AI Task Triage

Working sheet / Fill it during the task; keep the source record alongside it.

Name / date / work period

Task, intended output, audience

Approved AI tool and user role

Data included / data to remove

Source of truth to verify against

What error could cause harm or rework?

Allowed AI actions / prohibited actions

Human reviewer and review point

Decision: use / revise / hold, with reason

AI Task Triage

Closeout / Check the result, name the gap, and set the next action.

Did the output stay within the requested task?

What fact, quote, or calculation needed checking?

Were any data or permission issues observed?

Keep, revise, or stop the workflow? Owner / date

COMPLETION CHECK

- ☐ Data boundary checked
- ☐ Source named
- ☐ Human gate named

NEXT USE

Use synthetic or redacted data for initial trials. Record a hold when authorization or sensitivity is uncertain.

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