

AI Tool Evaluation Worksheet

IMPORTANT — BEFORE YOU USE THESE TEMPLATES

These templates are starting points for individuals without existing AI governance practices. They are not legal documents and are not a substitute for qualified legal or professional advice. Review and adapt them to your specific situation, jurisdiction, and context before use. Do not rely on any template in this kit as a final or complete governance solution. The Operator's Manual for Artificial Intelligence makes no representations as to their completeness, accuracy, or fitness for any particular purpose.

WHAT THIS IS

Use this worksheet before adopting a new AI tool — or before expanding how you use a tool you already have. It helps you understand what the tool does with your data, what risks it carries, and whether it is appropriate for what you need it for.

Complete one worksheet per tool. Keep completed worksheets on file. Review when the tool updates its terms, changes its privacy policy, or when your use of the tool changes significantly.

1. Tool Information

Tool name	
Provider	
Plan or version	
Date evaluated	
Privacy policy URL	

2. Data Handling

Find the answers below in the tool's privacy policy or terms of service. If you cannot find an answer, treat it as Unknown.

Does this tool store my inputs (prompts, files, data I provide)?

- ☐ Yes
- ☐ No
- ☐ Unknown — treat any sensitive information as if it is being stored.

Notes: _____

Does this tool use my inputs to train its AI models?

- ☐ Yes

- ☐ No — confirm this is the default setting, not an opt-out you must enable.
- ☐ Unknown — do not paste personal, confidential, or sensitive information into this tool.

Notes: _____

Can I delete my data or conversation history?

- ☐ Yes — describe how: _____
- ☐ No
- ☐ Unknown

Does this tool share my data with third parties?

- ☐ Yes
- ☐ No
- ☐ Unknown

Notes: _____

3. Privacy and Terms

Where is my data stored (country or region)?	
Does this tool have a privacy policy I can read?	☐ Yes ☐ No
Have I read the relevant sections?	☐ Yes ☐ No
Does this tool require an account?	☐ Yes ☐ No
Can I use this tool without sharing personal information?	☐ Yes ☐ No ☐ Partial

4. What I Will Use This Tool For

Based on what I now know about how this tool handles data, I will use it for:

Describe the specific tasks or types of work...

5. What I Will Not Use This Tool For

Based on what I now know about how this tool handles data, I will not use it for:

- ☐ Tasks involving other people's personal information.

- ☐ Tasks involving confidential, employer, or client information.
- ☐ Tasks where the output will be published without independent verification.
- ☐ Tasks where an error could cause financial, legal, or reputational harm.
- ☐ Other: _____

6. Decision

- ☐ Adopt — I understand how this tool handles my data and I accept the risks for the uses listed above.
- ☐ Trial — I will use this tool in limited, low-risk contexts only until I understand it better.
- ☐ Reject — This tool's data handling or terms are not acceptable for my purposes.

Reason for this decision:

Summarize why you made this decision...

7. Sign-off

Name	
Date	