

Personal Automation Checklist

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 checklist before setting up any AI automation — any situation where AI takes an action without you reviewing each individual output first. This includes scheduled tasks, auto-replies, auto-publishing, code that runs without human review, or any workflow where AI acts on your behalf.

If you cannot answer all questions in Section 3, do not proceed. Complete one checklist per automation and keep it on file.

1. Automation Information

What the automation does (one sentence)	
AI tool or system used	
Date of this assessment	

2. What the Automation Acts On

Check everything that applies. Be specific.

- ☐ Sends communications on my behalf (email, messages, posts).
- ☐ Modifies files, records, or data.
- ☐ Makes purchases or financial transactions.
- ☐ Interacts with external services or systems.
- ☐ Publishes content publicly.
- ☐ Other: _____

Describe the specific action in plain terms:

e.g., 'Automatically replies to enquiries using a drafted response'...

3. Risk Questions

Answer every question before proceeding. If any answer is 'No' or 'Unknown', stop and resolve it first.

Can I describe exactly what this automation will do in every scenario?

- ☐ Yes
- ☐ No — STOP. Do not automate until you can answer this with certainty.

Do I know what happens when the automation produces a wrong or unexpected output?

- ☐ Yes — describe: _____
- ☐ No — STOP. Define failure behavior before proceeding.

If this automation makes a mistake, can the mistake be undone?

- ☐ Yes — describe how: _____
- ☐ No — this automation carries irreversible risk. Treat with extra caution.
- ☐ Partially — describe what cannot be undone:

How will I know if something goes wrong?

Describe your monitoring method — how you will notice a problem...

4. How to Stop It

If this automation behaves unexpectedly, I will stop it by:

Describe the exact steps to disable or pause this automation immediately...

I have tested that I can stop it: ☐ Yes ☐ Not yet — test before enabling.

5. Go / No-Go Decision

- ☐ GO — All questions answered. Risk understood. Monitoring in place. Rollback tested.
- ☐ NO-GO — One or more questions unanswered. Do not proceed.

If NO-GO, what must be resolved before I revisit:

List the open items...

6. Sign-off

Name	
Date	
Date to review this automation	