

How to Use Your Team Kit

About This Kit

This kit contains six documents for anyone responsible for how others use AI — managers, team leads, business owners with staff, and organizations with compliance requirements. These templates address the governance gaps that most organizations leave unaddressed when they begin using AI.

Individual AI use in your organization does not become organizational AI use automatically. It becomes organizational AI use when it affects clients, creates records, produces outputs others rely on, or carries consequences for people beyond the person who ran the prompt. These templates are for organizations that have reached that point, or want to be ready before they do.

IMPORTANT — BEFORE YOU USE THESE TEMPLATES

These templates are starting points for organizations without existing AI governance. They are not legal documents and are not a substitute for qualified legal counsel. Review and adapt them to your specific jurisdiction, industry, and situation before use. Do not implement any policy, form, or checklist from this kit without professional review. The Operator's Manual for Artificial Intelligence makes no representations as to their completeness, accuracy, or fitness for any particular purpose.

What's in This Kit and When to Use It

Read this section first. Use it to decide which template applies to your current situation.

Document	What it does	Use it when
1. How to Use (this document)	Explains the kit, the recommended order, and how the templates connect to the guide.	Read first. Keep for reference.
2. Acceptable Use Policy	Defines which AI tools your organization permits, who may use them, and for which purposes.	Before staff begin using AI tools in any work-related context.
3. AI Incident Log	A structured record for documenting AI failures, errors, and near-misses.	When AI output causes a problem, data exposure, or unexpected result.
4. Automation Approval Form	A sign-off document for any task your organization is considering	Before any AI automation is deployed without

	automating with AI.	human review on each output.
5. Data Classification Worksheet	Guides a structured review of what information is safe to share with an AI tool.	Before any task involving client data, personnel records, or sensitive material.
6. AI Output Review Checklist	A five-point pre-action checklist aligned to the Risk Ladder.	Before acting on, sending, or automating any AI output at Medium risk or above.
7. Vendor Questionnaire	Structured questions to ask before adopting a new AI tool or platform.	Before any new AI tool procurement or onboarding decision.

Recommended Order of Implementation

If you are implementing AI governance for the first time, use this sequence. Do not skip to a later document before completing the earlier ones — the later documents assume the earlier ones are in place.

Step 1	Complete the Data Classification Worksheet (Document 5) first. You cannot govern AI use safely until you know what information is in scope.
Step 2	Draft and adopt the Acceptable Use Policy (Document 2). This is your foundational rule. All other controls derive from it.
Step 3	Distribute the AI Output Review Checklist (Document 6) to every staff member who uses AI in their work.
Step 4	Complete a Vendor Questionnaire (Document 7) for every AI tool currently in use or under evaluation.
Step 5	Complete an Automation Approval Form (Document 4) before deploying any AI automation.
Step 6	Activate the AI Incident Log (Document 3). Assign a staff member to maintain it. Brief staff on when and how to file an entry.

How These Templates Connect to the Guide

Each template puts a specific principle from The Operator's Manual for Artificial Intelligence into practice at the organizational level.

Acceptable Use Policy	OPERATE — Define the boundary between permitted and prohibited AI use before problems arise.
AI Incident Log	MONITOR — Create a record of what went wrong and support pattern recognition over time.
Automation Approval Form	OPERATE — Require explicit authorization before AI acts without human review on each output.
Data Classification Worksheet	ASSESS — Establish what information is safe to share before sharing it.
AI Output Review Checklist	TEST — Verify output before it reaches clients, systems, or public channels.
Vendor Questionnaire	ASSESS — Understand what a tool does before your organization relies on it.

The Acceptable Use Policy — Adoption Process

A policy that has not been adopted does not govern anything. When you finalize the Acceptable Use Policy:

- ☐ Assign a Policy Owner. This is the named individual responsible for maintaining and enforcing the policy. Without a named owner, a policy becomes advisory.
- ☐ Set a version number and effective date.
- ☐ Distribute the policy to all staff who use AI tools in any work-related context. Distribution by email is sufficient if you retain a record that it was sent and when.
- ☐ Obtain acknowledgment from each staff member that they have received and read the policy. The Acceptable Use Policy template includes a sign-off section for this purpose.
- ☐ Calendar a review date. Policies that are never reviewed become inaccurate as AI tools and your organization's use of them changes.

The policy is a governance document, not a training document. Staff who receive it should also receive a briefing on what it means in practice.

The Automation Approval Form — Sign-off Chain

The Automation Approval Form requires four sign-offs before any AI automation is approved. This is not bureaucratic overhead. Each sign-off serves a distinct governance function:

Requestor	The person proposing the automation. Accountable for the
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	accuracy of the risk description and task scope.
Technical Reviewer	Confirms the technical implementation is sound and that failure modes are understood.
Data / Privacy Reviewer	Confirms that the automation does not expose data inappropriately or create a compliance risk.
Authorizing Manager	Final sign-off. Accountable for the decision to proceed. Cannot be delegated to the requestor.

An automation that proceeds without all four sign-offs has no documented governance. If the automation later causes a problem, there is no record that the risk was assessed and accepted.

The AI Incident Log — Who Files and When

The AI Incident Log is a shared organizational record. It is not a blame log. The purpose is to create a pattern of what goes wrong, so the organization can adjust its controls over time.

Any staff member should be able to file an entry. The threshold is low: if AI output caused or could have caused a problem, it belongs in the log. Near-misses are as valuable as actual incidents — they reveal risk before harm occurs.

Assign one person to maintain the log and review entries regularly. That person should also identify patterns and bring recurring issues to the Policy Owner.

Connecting This Kit to the Guide

Sub-Module 2.1 (Before You Paste) covers what is safe to share and underpins the Data Classification Worksheet. Sub-Module 2.2 (Before You Trust) covers verifying output and underpins the AI Output Review Checklist. Sub-Module 2.3 (Before You Automate) covers automation controls and underpins the Automation Approval Form. Sub-Module 2.4 (Building a Small AI Policy) covers governance and underpins the Acceptable Use Policy. How AI Fails and the Risk Ladder describe the failure modes and risk tiers these controls respond to.

These templates are the operational layer of the controls described in Module 2. Reading the relevant Sub-Module before implementing each template will make the template more useful and the implementation more durable.

A Note on the Legal Disclaimer

Every template in this kit includes the statement: “These templates are not legal documents and are not a substitute for qualified legal counsel.”

This means: if your organization operates in a regulated industry, handles personal data subject to privacy law, or faces specific compliance requirements, these templates do not substitute for qualified legal review. They give you a governance starting point. Your legal counsel should confirm that the specific language, scope, and controls in each template are appropriate for your jurisdiction and industry before implementation.

Review Schedule

Review the documents in this kit whenever:

- ☐ Your organization adopts a new AI tool or platform.
- ☐ An AI-related incident is filed in the Incident Log.
- ☐ Applicable regulations or your industry standards change.
- ☐ At minimum, once per year.

Date of next scheduled kit review: _____

Policy Owner responsible for review: _____