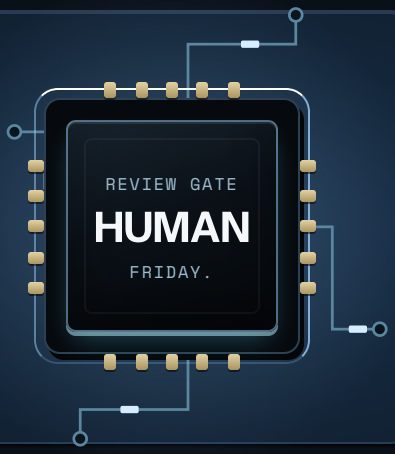
WORKFLOWS · PDF WORKSHEET

Human Review Map

Put a person where review actually protects you: few review points, placed where mistakes are costly, set up so the reviewer can decide in seconds.

6 SECTIONS · 16 CHECKS · PRINT AND FILL



01 Pick the level of review

3 MODES

1 IN THE LOOP
The AI cannot complete the step until a person approves, edits or rejects it. For actions you cannot take back.

2 ON THE LOOP
The AI acts; a person monitors results and steps in. For frequent, reversible work with a good log.

3 OUT OF THE LOOP
People set the rules and check performance periodically. For low-impact tasks with a long, clean record.

02 Steps that need a person

4 CHECKS

- **Irreversible actions:** sending to a customer, publishing, deleting, submitting.
- **Money and commitments:** payments, refunds, discounts, quotes, contract terms.
- **Low confidence:** the AI flags uncertainty, missing information or conflicting sources.
- **New territory:** in the first weeks of any automation, review a sample of everything.

Internal, reversible, low-impact steps (tagging an email, drafting an internal note) can usually run without approval, as long as they are logged.

03 Map your workflow

FILL IN

STEP	MODE	WHO REVIEWS	THE SPECIFIC CHECK
	In · On · Out		
	In · On · Out		
	In · On · Out		
	In · On · Out		
	In · On · Out		
	In · On · Out		

04 Design reviews people actually do

5 CHECKS

- **Bring the context:** show the AI's output next to the source it used.
- **Route to the right person:** refunds go to whoever owns refunds, not a shared inbox.
- **Keep a record:** who approved what, when and why, in a log nobody can quietly edit.
- **Make the decision clear:** approve, edit or reject, with the reason captured in one click.
- **Set a time limit:** decide what happens if nobody reviews within a day.

05 Keep attention real

5 CHECKS

- **Keep the volume humane.** Review a sample and gate only the risky items.
- **Show what changed.** Highlight the edit instead of showing the whole record.
- **Separate proposing from doing.** The AI proposes; a person or a fixed rule executes.
- **Ask for a specific check.** "Confirm the price matches the quote sheet", not "Does this look OK?"
- **Watch edit rates.** A reviewer who never changes anything may be approving on sight.

06 One-page approval policy

FILL IN

POLICY ITEM	THIS WORKFLOW
Steps that need approval	
Who approves	
Backup when that person is away	
Longest wait before it escalates	
Last updated	

- **Loosen with evidence.** Relax a review point only when the log shows the AI is reliably right; money and irreversible actions stay gated.
- **Use the corrections.** When the same fix repeats, update the instructions or add the case to your tests.

NEXT STEP

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