

Four Questions Before an Agent's Answer Becomes Action

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Use this worksheet on one or two real processes in which an agent produces, transforms, recommends, or passes on a claim. The result is a decision map: it shows where four different organizational decisions are explicit and where one generic "approve" is carrying too much weight.

This is not a maturity score. A blank cell is a useful finding.

How to complete it

1. Name up to two bounded processes. "Release a refund recommended by an agent" is more useful than "customer-service AI."
2. In each cell, write the current rule, its owner, and one record that would show the rule was applied. Mark **E** = explicit, **P** = partial or informal, or **M** = missing.
3. Circle any process where one "approve" button silently decides several rows. Choose one **P** or **M** to clarify first, preferably where a consequence becomes durable.

Your process map

Decision and question	Process A: _____	Process B: _____
Epistemic standing: Is this claim warranted for this purpose and consequence?	E/P/M: __ Owner: __ Rule/evidence: __	E/P/M: __ Owner: __ Rule/evidence: __
Persistence: May this version influence later work? How long is its history kept?	E/P/M: __ Owner: __ Rule/evidence: __	E/P/M: __ Owner: __ Rule/evidence: __
Visibility: Who may retrieve which version and context?	E/P/M: __ Owner: __ Rule/evidence: __	E/P/M: __ Owner: __ Rule/evidence: __
Action enablement: Who may act now, within which boundary and escalation path?	E/P/M: __ Owner: __ Rule/evidence: __	E/P/M: __ Owner: __ Rule/evidence: __

Complete these three sentences:

The decision currently hidden inside "approve" is: _____

The owner or rule we cannot yet name is: _____

Before the next comparable case, we will clarify: _____

Your output is the completed map and one next decision. Keep it beside the workflow.

Filled example / customer refund recommendation

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Process: An agent reviews a customer request and recommends whether a refund should be offered. A human service lead may release the refund.

Decision	Example answer	Status
Epistemic standing	The service lead checks the current policy, transaction and customer evidence before relying on the recommendation.	P - the evidence requirement is unwritten.
Persistence	The case record is retained; an unresolved recommendation based on a corrected policy should stop guiding release.	M - no owner or eligibility rule is defined.
Visibility	The assigned team sees internal evidence; the customer receives the decision and explanation, not unrelated records.	E - access and representations are defined.
Action enablement	Only a named service lead may release a refund within the current limit; exceptions escalate.	P - release-time authority is not evidenced.

Result: Define who stops unresolved recommendations after a policy change and how current authority is checked when money is released.

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