

AI data-handling worksheet

General educational aid only

This blank worksheet helps explain the types of questions involved in an AI data path. It is not a professional assessment, clinical practice tool, legal compliance determination, product approval, or validated implementation procedure.

The original worksheet pages follow. Labels such as "Approved task" and "Approval" refer only to an organization's own decisions. Filling in a field does not establish that an activity is lawful, secure, safe, or appropriate.

Specific decisions require qualified clinical, legal, privacy, security, and organizational review for the setting. The website does not offer those services.

Use data types or fully made-up examples. Do not enter identifiable patient information or sensitive client details. A downloaded file is filled in on your device; the website does not receive its entries. Your software and storage choices may affect where it is saved.

Educational scope updated October 12, 2026.

AI data map worksheet

Know what goes in, where it goes, and who checks it.

Use this before approving a tool, and when its data use changes.

Use made-up examples or types of data. Do not include client details.

For learning and planning. This is not legal or security advice.

Tool and seller

Approved task

Person in charge

Person who checks the work

Proof and contract details

Approval

Next review date

Follow the data

Start with the information a tool receives and keeps.

1 Data going in

List the types of data the tool gets. Include private health and staff data.

Answer

Proof or source

What still needs to be checked

2 Where data is used

List the firms and places that use or process the data. Include firms hired by the seller.

Answer

Proof or source

What still needs to be checked

3 How long data stays

State how long data is kept. Explain how to get it back or delete it.

Answer

Proof or source

What still needs to be checked

Set clear boundaries

Record the rules for AI training and access.

4 Training the AI

Can the seller use your data or the tool's results to train AI? List the rules and settings that control this.

Answer

Proof or source

What still needs to be checked

5 Who can see data

List staff, seller staff, and other firms that can see the data.

Answer

Proof or source

What still needs to be checked

Make the proof easy to find.

Record the contract, policy, setting, or written answer you checked.

Add its date or a link. If a point is unclear, name who will check it.

Track results and changes

Keep the map useful after a tool is approved.

6

Records of tool use

What does the tool record about requests, results, and user actions? Who checks these records?

Answer

Proof or source

What still needs to be checked

7

Where results go

List where results are sent, copied, or stored. Include the electronic health record (EHR).

Answer

Proof or source

What still needs to be checked

Changes that need a new review