

Ok, Boomer

**The Old Farm Field Guide
to Practical AI**

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“You can teach an old dog new tricks!”

Joshua Bloodworth

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A note about this book

This book is for adults who want to understand what an AI assistant can do without pretending the tool is wiser than it is. You may be curious, skeptical, interested, irritated, or all four before lunch. Any of those is a reasonable place to begin.

You do not need a technical background. You need one ordinary task, a willingness to try a small experiment, and the judgment you already use in the rest of your life.

The examples use fictional people, places, dates, and organizations unless a source is named. Do the same when you practice. Keep passwords, account numbers, private records, full addresses, and unnecessary personal details out of an AI conversation.

This book offers general education. It does not provide medical, legal, financial, mental-health, emergency, or other professional advice. Use qualified people for decisions where expertise or accountability matters.

How to use the field guide

You can read straight through or start with a problem you want to solve. Each chapter follows a familiar rhythm:

- an everyday situation
- a plain explanation
- a complete example
- something to notice
- a short activity
- a safety or judgment check
- a next step

Keep a notebook nearby, use the printable practice pages in the appendices, or write in a separate document. If you prefer not to use an AI tool yet, every important activity can be done with the sample conversations in this book.

The central routine is short enough to remember. It is called **AND**:

Ask. Notice. Decide.

Ask for useful help. Notice what the answer does well and where it may be wrong. Decide what to use, revise, verify, reject, or take to a qualified person.

The name also carries the story: Boomer **and** Scout, human judgment **and** AI assistance. During Ask, give Scout a clear **LEAD**: Lay out the situation, Explain the job, Add limits, and Define the voice. Scout can move quickly. Boomer still checks the gate.

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FIELD NOTE 01

1. Welcome: Keep Your Judgment



Ask. Notice. Decide.

You are not late

Imagine that a friend shows you an AI assistant on a phone. They type one sentence. A polished answer appears almost at once. The speed is impressive. It can also make a reasonable person suspicious.

Where did the answer come from? How much should you trust it? What happens to the information you type? What if the answer sounds good and quietly gets an important detail wrong?

Those questions are useful. They are evidence that your judgment is working.

People often talk about AI as if everyone else has already mastered it. They have not. Many experienced users are still learning where these tools help, where they waste time, and where they create risk. The buttons change. The product names change. The need to inspect an answer does not.

This book asks you to supervise a useful, unreliable assistant. You can do that without becoming a technology person.

What confidence means here

Confidence does not mean trusting the tool more.

Confidence means knowing what to do next.

You can ask for a draft without assuming every detail is true. You can request a simpler explanation without treating it as professional advice. You can brainstorm options and still make your own choice. You can stop a conversation, remove private information, ask a follow-up question, or decide that a person needs to handle the matter.

That is practical confidence. It grows from small acts of judgment:

- choosing a sensible task
- giving enough context
- noticing a gap or guess
- asking for a revision
- checking a claim where it matters
- keeping the final decision with a person

The goal is one useful attempt and better judgment about the answer.

Your starting point

Some readers arrive curious. They have a trip to plan, a letter to understand, a garden project to organize, or a family story they want to preserve. Others arrive cautious because they have seen a confident wrong answer, heard about privacy problems, or felt pressure to keep up with a technology they did not ask for.

Curiosity and caution can work together. Curiosity helps you try. Caution helps you check.

Take a moment before you continue.

Write one sentence for each prompt:

1. One ordinary task where a little help might be useful.
2. One thing about AI that you do not trust yet.
3. One result that would make this book worth your time.

You will return to these sentences near the end.

BOOMER'S NOTE

Experience is an advantage here. You already know that a confident tone does not prove a claim, a fast worker still needs supervision, and a useful draft can require correction.

A room with more than one door

There is more than one valid way to practice. You may type, speak, work with a partner, or stay on paper. You may use your own low-stakes task or one of the fictional examples in this book. You may pause and come back later.

Speed is not evidence of learning. A person who takes ten minutes to inspect an answer may be using better judgment than someone who accepts it in ten seconds.

If a device, account, or internet connection gets in the way, switch to a printed conversation. The learning still counts. The skill is supervising the answer, not winning a race with the interface.

A first look at Ask, Notice, Decide

Suppose you need a friendly reminder for a neighborhood meeting.

Ask: You tell the assistant what is happening, what you want written, and what details are known.

Notice: You read the answer once for usefulness and again for doubt. You see that it added a room number you never provided.

Decide: You ask it to remove the unsupported room number and mark any missing fact with [confirm]. You check the address against the neighborhood association's current notice before sending the message.

No technical expertise was required. You provided context, spotted a guess, requested a repair, and checked the fact that could send people to the wrong place.

Check the gate

CHECK THE GATE

For your first practice, choose a task where a mistake would be inconvenient rather than dangerous. Use made-up or non-identifying details. Pick a result you can judge with your own experience.

Chapter field notes

- You bring useful judgment before the tool produces a word.
- Curiosity and caution can work together.
- Confidence means knowing what to do next.
- Ask, Notice, Decide is the routine used throughout this book.

Next step

Choose one ordinary annoyance that might make a good practice task. Do not solve it yet. Write it down and carry it into Chapter 4.

FIELD NOTE 02

2. AI in Plain English



Ask. Notice. Decide.

A useful-looking response

An AI assistant can write a birthday invitation, reorganize a list, explain a paragraph, suggest meal ideas, or draft questions for a conversation. It can do this quickly and in a tone that sounds confident.

The confidence is part of the writing style. It is not proof that the answer is correct.

To use the tool well, you need a practical picture of what it is doing. You do not need a tour of computer science.

What the assistant is doing

A text-based generative AI system produces a likely continuation based on patterns learned during training and the information available in the current request or conversation. In ordinary language, it predicts a useful-looking response.

That ability makes the tool good at several kinds of starting work:

- drafting and rephrasing
- sorting and grouping
- summarizing text you provide
- suggesting options
- changing tone or format
- explaining an idea in another way
- helping you prepare questions

The tool may also answer factual questions. The problem is that a fluent answer can contain false, outdated, invented, or unsupported details. The National Institute of Standards and Technology uses the term **confabulation** for confidently presented false or erroneous content produced by generative AI. Many people use the word **hallucination** for the same problem.

You only need one sentence for everyday use:

A fluent answer is not automatically a true answer.

What the assistant does not automatically know

The tool does not automatically know your situation. It may lack the date, location, audience, history, or constraints that make an answer useful. It does not automatically confirm every factual claim. It does not understand the consequence of being wrong in the way a person affected by the decision does.

Sometimes it can search or work with connected information. Those capabilities vary by product, account, settings, and date. A search feature may still misunderstand a source. A connected app may have access only to certain files or permissions. A current-looking answer can still apply the wrong rule to your situation.

Treat tool features as ways to gather or shape information. Keep verification and judgment as separate steps.

Why wrong answers can sound convincing

An AI assistant is built to produce coherent language. It can supply names, times, explanations, quotations, citations, or links that look specific. Specificity feels like evidence, but the detail may have been generated because it fit the pattern of the answer.

Consider a fictional request.

Request

Write a friendly announcement for our neighborhood seed swap at Eastview Library on Saturday, April 18. Include the parking information.

First answer

Join us at 10 a.m. on Saturday, April 18, for the Eastview Library Seed Swap. Registration is required, and free parking is available behind the library. Bring labeled seeds to share!

The answer is friendly and easy to read. It also invents three details:

1. The request did not provide a start time.
2. The request did not say registration was required.
3. The request asked for parking information but did not provide any.

The answer filled the gaps with plausible material. Nothing in its tone tells you which parts came from the request and which parts were guessed.

A better follow-up

The first answer is a draft to supervise.

Follow-up request

Remove any detail I did not provide. Replace missing facts with [confirm]. Keep the tone friendly.

Revised answer

Join us on Saturday, April 18, for the Eastview Library Seed Swap. Time: [confirm]. Registration: [confirm]. Parking: [confirm with the library]. Bring labeled seeds to share!

The revised answer is less polished in one sense because it shows the missing facts. That makes it more useful. You can now call the library or check the official event listing before publishing the announcement.

What to notice in the example

The request itself encouraged a guess by asking for parking information that had not been supplied. The tool could have asked a question or marked the gap. Instead, it wrote the kind of detail that often appears in an event announcement.

The follow-up gives the assistant a clear rule for uncertainty. It can expose gaps and make the draft easier to review. You still need to inspect the revision.

The final check happens outside the AI conversation. Another answer from the same assistant is not independent confirmation.

BOOMER'S NOTE

Scout may bring back the nearest thing that looks like the ball. Check what arrived before you throw it again.

Four kinds of work

It helps to sort tasks by what you expect from the answer.

1. Shape

You provide the facts and ask the assistant to change the wording or structure.

Examples: make this note shorter, turn these notes into an agenda, organize this list by room, rewrite this paragraph in plain language.

These tasks are often good starting points because you can compare the output with material you already know.

2. Suggest

You ask for options that you will judge.

Examples: suggest three low-cost meal ideas using these ingredients, offer several names for a garden club, list questions I might ask at a museum tour.

Suggestions can be useful without being factual claims. They still need to fit your limits.

3. Explain

You ask the assistant to make an idea easier to understand.

Examples: explain this insurance term in plain language, compare two instructions I provide, define a word in the context of this letter.

An explanation can be clear and wrong. Check the original document or a qualified source when the meaning affects a decision.

4. Claim

You ask for facts about the world.

Examples: when does this office close, what does this medicine interact with, what tax rule applies, is this travel requirement current.

Claims require the strongest verification, especially when the information changes or the consequence of error is serious.

Short activity: label the work

For each request, write **Shape, Suggest, Explain, or Claim**.

1. Turn these five notes into a grocery list by aisle.
2. Give me four ideas for a rainy-day activity with two grandchildren.
3. Explain the cancellation paragraph in this contract.
4. Tell me whether the passport rule changed this month.
5. Rewrite my draft so it sounds warm and direct.

Possible answers appear in Appendix E. More than one label may fit. The purpose is to notice what kind of checking the answer will need.

What about privacy settings?

Products provide different controls for conversation history, model improvement, memory, temporary conversations, connected apps, and data deletion. The names and locations of those controls can change. Organization-managed accounts may follow different rules from personal accounts.

Check the current settings and policy for the tool you use. Do not treat a setting as permission to paste information the task does not need. The safest private detail is often the one you leave out.

Check the gate

CHECK THE GATE

Before acting on an answer, ask which parts are wording, suggestions, explanations, or factual claims. Check the claims that matter against a current source outside the conversation.

Chapter field notes

- An AI assistant predicts a useful-looking response from patterns.
- Fluent language can hide unsupported details.
- Shaping and suggesting are often easier first tasks than consequential factual questions.
- A follow-up can expose missing information, but verification happens elsewhere.

Next step

Look at the ordinary task you wrote down in Chapter 1. Is it mainly shaping, suggesting, explaining, or claiming? Write the label beside it.

FIELD NOTE 03

3. Boomer and Scout



Ask. Notice. Decide.

Why two dogs belong in an AI book

Boomer is the old reliable sheepdog. He has worked enough gates to know that enthusiasm and direction are different things. Scout is the young pup. Scout is quick, fluent, eager to help, and occasionally very sure of nonsense.

Scout represents the AI assistant. Boomer represents the judgment you bring.

The title's joke points toward the technology, not the learner. Boomer has context Scout cannot supply: values, relationships, consequences, history, taste, and a working sense of what matters.

Scout can fetch an answer. Boomer decides whether to bring it inside.

The story behind AND

The word **and** matters. Boomer and Scout are more useful together than either would be alone. Scout brings speed, fluency, and fresh possibilities. Boomer brings context, consequence, patience, and the authority to choose.

That is also the practical relationship between a person and an AI assistant. Human judgment and AI assistance can work together. The assistant helps with the work. The person remains responsible for what happens next.

The AND loop

The full method is **Ask. Notice. Decide**. The first letters spell AND. Each move contains a few smaller actions, but the three words are enough to guide you when an answer is on the screen.

Ask

Choose a suitable task. Then give Scout a clear **LEAD**:

- **Lay out the situation.** What does Scout need to know?
- **Explain the job.** What do you want the assistant to produce or do?
- **Add limits.** What should the answer respect, avoid, include, or mark as uncertain?
- **Define the voice.** How should the result sound or look?

LEAD lives inside Ask. AND carries the whole job from the first request through the final human decision.

You are the source of context. A vague request is not a moral failure. It simply gives the assistant more room to guess. You can begin with ordinary language and add what is missing.

Notice

Read the answer twice.

On the first pass, look for usefulness. What phrase, structure, explanation, or option might you keep?

On the second pass, look for doubt. What sounds too certain, oddly specific, incomplete, out of date, private, or unlike you? What factual claim would matter if it were wrong?

Then improve the answer with a follow-up and verify important claims elsewhere.

Decide

Choose what happens next. You might use part of the answer, revise it again, reject it, check a source, start over, or take the question to a qualified person.

The assistant does not get a vote simply because it produced the draft.

A complete walk through the routine

Marian volunteers at a community center. She has rough notes for a reminder about a Thursday craft session. She wants a short message for the center's email list.

Her notes say:

- Thursday, May 14
- community room
- bring scissors if you have them
- materials provided
- contact the front desk with questions

Ask

Write a warm, short reminder for the community center email list. The paper-craft session is Thursday, May 14, in the community room. Materials are provided. People may bring scissors if they have them. Direct questions to the front desk. Do not add a time, fee, address, or registration requirement. Mark anything else that needs confirmation.

First answer

Join us Thursday, May 14, in the community room for a relaxed paper-craft session. Materials are provided, and you are welcome to bring scissors if you have them. The session begins at 2 p.m. Questions? Contact the front desk. We hope to see you there!

Notice

Marian likes the friendly tone and the clear list of materials. She notices that the assistant added a start time even after being told not to add one.

Follow-up

Remove the start time. Keep every remaining detail tied to my notes. Make the final sentence less promotional.

Revised answer

A paper-craft session will be held Thursday, May 14, in the community room. Materials are provided, and you may bring scissors if you have them. Contact the front desk with questions.

Verify

Marian compares the revised message with the center's current schedule. The date and room match. She confirms that the center allows participants to bring their own scissors.

Decide

She uses the revised answer after adding the official start time from the schedule herself.

What to notice

Marian gave clear limits. The assistant ignored one. That can happen. A good request reduces guesswork; it does not remove the need to inspect the answer.

She did not ask the assistant whether its own start time was correct. She checked the schedule.

She also made a voice decision. The sentence “We hope to see you there!” was harmless, but it sounded more promotional than the center’s normal notices. Accuracy includes fit, not only facts.

Practice on paper

Read this response to a fictional notice.

Original notice

The north entrance is temporarily inaccessible due to repairs. Use the south entrance until further notice.

AI explanation

The north entrance is closed for repairs. Everyone should enter through the south entrance until the work is finished. The repairs will be complete next Friday.

Write one answer for each question:

1. What is useful?
2. What was assumed?
3. What needs checking?
4. What follow-up would you ask?
5. What would you do before sharing the explanation?

Check the gate

CHECK THE GATE

Do not skip from Ask to Decide. The Notice step is where you find useful material, unsupported details, privacy problems, and claims that need a source.

Chapter field notes

- The assistant brings speed and fluency. You bring context and consequence.
- AND means Ask, Notice, Decide.
- Boomer and Scout represent human judgment and AI assistance working together.
- During Ask, give Scout a clear LEAD.
- Notice separates useful material from gaps and guesses.
- Decide keeps authority with a person.

Next step

Say the three moves aloud once: Ask. Notice. Decide. Then explain each one in your own words without looking back.

FIELD NOTE 04

4. Choose a Good First Task



Ask. Notice. Decide.

Start where learning is cheap

Many people begin with the hardest question in front of them. They ask about a diagnosis, a legal dispute, a large financial choice, or a private family problem. Those questions carry real consequences and often require facts the tool cannot safely supply.

A first task should let you practice without paying a high price for a weak answer.

Choose something ordinary and useful: a confusing paragraph, a short reminder, a list of options, a set of notes to organize, or questions to prepare for a conversation.

The three task gates

A good practice task passes three gates.

Low stakes

A mistake would be inconvenient rather than dangerous.

Drafting a potluck reminder is low stakes. Choosing whether to stop a medication is high stakes. Brainstorming questions for a tax preparer may be useful preparation. Deciding how to file a complicated return requires qualified help.

Low privacy

The task works with made-up or non-identifying details.

You can ask for a template without using a real name, address, account number, diagnosis, or private document. If the task requires a sensitive detail, ask whether a more general version would still be useful.

Clear result

You can recognize whether the answer helps.

If you know the meeting details, you can judge whether the reminder includes them. If you provide a list of ingredients, you can see whether the meal ideas use them. If you ask about an unfamiliar legal rule, you may not know enough to judge the answer. That is a poor first task.

A task menu

These are usually manageable starting points:

- rewrite a note in a clearer tone
- organize a list by category
- turn rough notes into an agenda
- suggest several names or options
- explain a paragraph you provide in simpler language
- prepare general questions for a conversation with a qualified person
- create a checklist from instructions you already have
- compare two drafts you provide
- brainstorm low-cost activities within clear limits

The word **usually** matters. A simple-looking task can become high stakes when the context changes. Rewriting a family invitation is ordinary. Rewriting a message that accepts a legal settlement is not.

Shrink the task

If your task misses a gate, you may be able to make it smaller.

Too broad: Help me plan my retirement.

Smaller: Give me a list of questions to take to a fiduciary financial adviser before discussing retirement income.

Too private: Review my full medical record and tell me what is wrong.

Smaller: Help me organize these non-identifying symptoms into a short list of questions for a licensed clinician. Do not diagnose.

Too uncertain: Tell me whether this contractor's work meets every local building code.

Smaller: Turn my inspection notes into a checklist I can review with the local building office or a licensed inspector.

Shrinking the task changes the role of the assistant. It becomes a preparation tool instead of a substitute for expertise.

Worked example: the confusing letter

Leon receives a fictional letter from a neighborhood association. The letter says:

Pursuant to the revised common-area use schedule, residents requesting reservation of the pavilion must submit the facilities request form no fewer than ten business days prior to the proposed event date. Submission does not constitute approval.

Leon wants help understanding the paragraph. He removes the association name, his address, and any account information.

Request

Explain this paragraph in plain language. Separate what it clearly says from anything I would need to confirm. Do not give legal advice.

First answer

You must submit a pavilion request at least ten business days before your event. Sending the form does not mean the reservation is approved. You should wait for written approval before making plans.

What to notice

The first two sentences stay close to the provided text. The third sentence may be sensible, but the paragraph did not say that approval would be written or that Leon should delay every plan. Those may be good questions for the association.

Follow-up

Rewrite the explanation using only what the paragraph clearly states. Then list two questions I could ask the association.

Revised answer

Plain-language explanation: Submit the pavilion request form at least ten business days before the planned event. Submitting the form does not mean the request has been approved.

Questions to ask:

1. How will I be told whether the request is approved?
2. Are there any other requirements or fees for reserving the pavilion?

Decision

Leon uses the plain-language explanation as a reading aid. He checks the full association policy and asks the office the two questions before making a commitment.

Your task-gate worksheet

Write your practice task in one sentence.

Low stakes: What could happen if the answer is wrong?

Low privacy: Which names, numbers, records, or identifying details can you remove?

Clear result: What will tell you that the answer is useful?

If one gate does not pass, shrink the task or use this prepared option:

Turn these fictional notes into a short, friendly reminder: Tuesday neighborhood meeting, 6 p.m., library community room, bring the draft garden plan, questions go to the volunteer coordinator. Mark any missing detail with [confirm].

Check the gate

CHECK THE GATE

Choose a task you can afford to inspect. If the answer would affect health, legal rights, major finances, safety, employment, or another serious consequence, use the assistant for preparation and bring the decision to a qualified person.

Chapter field notes

- A good first task is low stakes, low privacy, and easy for you to judge.
- Broad or private tasks can often be made smaller.
- Preparation tasks are safer than asking the tool to replace expertise.
- A prepared fictional task is always a valid practice route.

Next step

Choose the task you will carry into Chapter 5. Write one sentence explaining why it passes all three gates.

FIELD NOTE 05

5. Ask Clearly



Ask. Notice. Decide.

Give Scout a clear LEAD

People sometimes speak about prompting as if a hidden formula will make the machine behave. A clear request is much more ordinary. You tell an assistant what is happening, what you want done, what limits matter, and how the result should sound or look.

You already use this skill with people. If you ask someone to “write a note about the meeting,” they need more information. Which meeting? Who will read the note? When and where is it? Should the note sound formal, friendly, urgent, or apologetic? Which details are confirmed?

The AI assistant has the same need for context and less ability to notice the social cost of guessing.

LEAD: four useful clues

LEAD is a memory aid inside Ask. It is not a required prompt format. Use it when a request feels vague, or when Scout has started running in the wrong direction.

L: Lay out the situation

What does Scout need to know? Give Scout the relevant background: what’s happening, who’s involved, and why you’re asking.

You do not need to tell the whole story. Give only the background that helps the task, without private details it does not need.

For example: “Our library is holding a book swap. We’re reminding people on the library’s email list about the event.”

L gives Scout the background. E explains the job you want done. For the book swap, E could be “Write a short reminder from these event notes.”

E: Explain the job

What do you want the assistant to produce or do?

Use a concrete verb: draft, sort, summarize, explain, compare, list, rewrite, organize, or ask.

A: Add limits

What should the answer include, avoid, preserve, or mark as uncertain?

Limits may cover length, known facts, unavailable facts, privacy, tone, cost, reading level, or professional boundaries.

D: Define the voice

How should the result sound or look?

You might ask for a warm reminder, a plain-language explanation, a short checklist, a two-column comparison, or a calm note with no sales language.

The word **voice** here means the tone or shape of the answer. It does not mean pretending the assistant is you. You still review and revise the final wording.

Before and after

Vague request

Write a message about the meeting.

Clearer request

Write a short, friendly reminder for the six neighbors who attend our monthly garden meeting. The meeting is Tuesday at 6 p.m. in the library community room. Ask people to bring the draft garden plan. Direct questions to the volunteer coordinator. Do not add an address, parking information, or registration instructions. Mark any other missing detail with [confirm].

The second request gives the assistant useful direction. It also sets boundaries around likely guesses.

Build the request in ordinary language

You can use labels while learning, but the final request can sound normal.

LEAD planning notes

- Lay out the situation: our six-neighbor garden group needs a reminder about its monthly meeting
- Explain the job: write a short reminder
- Add limits: use confirmed details, mark gaps, do not invent parking or registration
- Define the voice: friendly and direct

Natural request

Please write a friendly, direct reminder for the six neighbors in our garden group. We meet Tuesday at 6 p.m. in the library community room. Ask everyone to bring the draft garden plan and direct questions to the volunteer coordinator. Use only those facts. Mark anything else that needs confirmation.

Both versions work. The labels are a planning aid, not required words.

Give source material a clear boundary

When you paste text for the assistant to explain or rewrite, tell it where the source begins and ends. A simple label is enough.

Explain the following paragraph in plain language. Keep the meaning close to the original. After the explanation, list any term I should confirm with the organization that sent it.

Source paragraph:

[paste the paragraph here]

If the source includes private information, remove it first. If the source is long, begin with one section instead of an entire file.

Ask the assistant to show uncertainty

An assistant may fill gaps unless you tell it how to handle them. These instructions can help:

- Mark missing facts with [confirm].
- Use only the facts in my notes.
- Separate what the source states from your general explanation.

- If a detail is unknown, ask me a question instead of guessing.
- List assumptions at the end.
- Cite the source used for each factual claim.

These instructions improve the answer. They do not guarantee accuracy. Continue to Notice and Decide.

Complete conversation: a volunteer newsletter

Ruth helps with a fictional neighborhood food pantry. She needs a short newsletter item based on confirmed notes.

Ruth's notes

- Saturday collection
- June 6
- 9 a.m. to noon
- community center lobby
- requested items: canned fruit, peanut butter, oatmeal
- no glass containers
- volunteers can help carry donations from the parking lot

First request

Write a short, warm newsletter item using my notes. Keep it under 120 words. Do not add a street address, phone number, tax claim, or donation rule that I did not provide. Mark missing facts with [confirm].

First answer

Help stock the neighborhood pantry on Saturday, June 6, from 9 a.m. to noon in the community center lobby. We are collecting canned fruit, peanut butter, and oatmeal. Please avoid glass containers. Volunteers will be available in the parking lot to help carry donations. Every contribution is tax deductible. Thank you for helping our neighbors!

The answer follows most of the request and then adds a tax claim.

Follow-up

Remove the tax statement. Keep the rest tied to my notes.
Replace the final sentence with a simple thank-you.

Revised answer

The neighborhood pantry collection will be held Saturday, June 6, from 9 a.m. to noon in the community center lobby. Requested items are canned fruit, peanut butter, and oatmeal. Please do not bring glass containers. Volunteers will be available in the parking lot to help carry donations. Thank you for supporting the pantry.

Verification and decision

Ruth compares each detail with the pantry's current collection notice. She confirms the date, time, location, requested items, glass rule, and volunteer help. She sends the revised item to the newsletter editor.

What to notice

The first request was clear. The assistant still added a common phrase about tax deductibility. This is a useful reminder that specific limits reduce risk but do not remove it.

Ruth could have asked for a shorter draft, a bullet list, or two tone options. She did not need a longer prompt. She needed a careful second read.

When more context makes the answer worse

People sometimes respond to a weak answer by pasting more and more personal information. That can create a privacy problem without fixing the request.

Add context that changes the task. Remove context that only makes the story more identifiable.

Useful context: the audience is six neighbors; the note should be under 100 words; the date is confirmed; unknown details should be marked.

Unnecessary context: a participant's full name, home address, account number, family conflict, private diagnosis, or a document unrelated to the task.

If you cannot explain why a detail helps the result, leave it out.

Activity: build your request

Use the task you selected in Chapter 4.

L: Lay out the situation: What does Scout need to know?

E: Explain the job: What do you want the assistant to produce?

A: Add limits: What facts, boundaries, length, privacy rules, or uncertainty markers matter?

D: Define the voice: How should it sound or look?

Now combine the answers into a natural request. Read it once and remove any personal detail the task does not need.

If you are practicing on paper, use the prepared community-center task in Appendix C and write the request by hand.

Check the gate

CHECK THE GATE

A clearer request gives the assistant less room to guess. It does not make the answer self-verifying. Plan to inspect the result even when the prompt is excellent.

Chapter field notes

- LEAD helps with Ask. AND carries the full loop.
- Lay out the situation, Explain the job, Add limits, and Define the voice.
- Ordinary language works.
- Tell the assistant how to mark missing information.
- Add context that changes the task, not personal detail that merely fills the story.

Next step

Save your complete request. In Chapter 6, you will keep the first answer long enough to learn from it.

FIELD NOTE 06

6. Improve the First Answer



Ask. Notice. Decide.

The first answer is material

An AI assistant often responds so quickly that people treat the result as finished. A better habit is to treat it as material on the workbench.

You may keep a sentence, reject a paragraph, ask for another approach, or change the standard. The follow-up is where much of the useful work happens.

Keep the first answer. Then improve it.

Inspect one part at a time

Read once for usefulness. Mark one thing you might keep.

Read again for doubt. Mark one thing that feels vague, missing, assumed, too certain, too long, too private, or unlike the intended voice.

This is easier than deciding whether the whole answer is “good” or “bad.” A weak answer may contain a useful structure. A strong answer may contain one dangerous claim.

Five follow-up starters

Use one follow-up at a time when possible. A single clear change makes comparison easier.

1. Make that shorter and warmer.
2. Give me two different approaches.
3. What assumptions are you making?
4. Mark every fact I should verify.
5. Ask me two questions before you revise it.

Other useful follow-ups include:

- Use only the facts in my notes.
- Explain the third paragraph with a concrete example.

- Remove advice and give me questions to ask a qualified person.
- Keep the structure and change the tone.
- Put the differences in a short table.
- Start over with this narrower task.

Complete conversation: the reunion email

Evelyn is helping organize a fictional family reunion. She wants a message that asks relatives to confirm attendance. She uses a made-up example while practicing.

Request

Write a warm email asking relatives to confirm whether they plan to attend a family picnic on Sunday, July 12, at Riverside Park. Ask for a reply by June 20. Keep it under 130 words. Do not add a time, shelter number, menu, fee, or address. Mark missing details with [confirm].

First answer

Subject: Family Reunion Picnic - Please RSVP

Hi everyone,

We are excited to gather for our family reunion picnic on Sunday, July 12, at Riverside Park. We have reserved Shelter 4 from noon to 4 p.m., and lunch will be provided. Please reply by June 20 to let us know how many people from your household will attend and whether you have dietary restrictions. We cannot wait to see everyone!

Evelyn likes the subject line and the clear reply date. She notices three invented details: the shelter, the time, and the meal. The request also did not ask for dietary information.

Follow-up 1

Remove every detail I did not provide. Keep the subject line and reply date. Use a warm tone without sounding excited on my behalf.

Second answer

Subject: Family Reunion Picnic - Please Reply by June 20

Hi everyone,

We are planning a family picnic on Sunday, July 12, at Riverside Park. Please reply by June 20 to let us know whether you plan to attend and how many people will be in your group. Time and meeting location: [confirm].

Thank you. We hope you can join us.

The unsupported details are gone. Evelyn decides that “Thank you” feels abrupt and “We hope you can join us” fits.

Follow-up 2

Keep the facts and subject line. Make the closing sound natural and welcoming. Give me two options for the final two sentences only.

Options

A. Please reply by June 20 when you have a chance. We hope you can join us.

B. Send your reply by June 20 so we can plan. It would be good to see you.

Decision

Evelyn chooses option A and adds the confirmed time and shelter from the park reservation herself. She keeps the assistant's role narrow: drafting and revising language.

What changed because she asked again?

The first follow-up removed unsupported content. The second worked on voice. Evelyn could compare each change because she asked for one main adjustment at a time.

The assistant did not “learn” a permanent lesson from the correction. It followed the new instruction within the conversation. A future answer may still need the same supervision.

Ask for alternatives when taste matters

There is rarely one correct tone for a note, invitation, title, or explanation. Ask for two or three approaches, then choose and revise.

Useful comparisons include:

- warm and conversational versus brief and practical
- paragraph versus checklist
- direct request versus softer invitation
- short explanation versus example-led explanation
- formal subject line versus plain subject line

Do not ask for ten options unless you need them. Too many choices can make a small task harder.

Know when to start over

A conversation can collect bad assumptions. If repeated follow-ups produce worse answers, open a new conversation and give only the useful context.

Start over when:

- the assistant keeps repeating an unsupported detail
- the topic has changed
- you pasted information you should not have shared
- the answer is tangled in earlier instructions
- a simple new request would be easier to review

Deleting or starting a new conversation does not automatically erase every copy or change every product's data practices. Check the current tool controls if deletion or retention matters. The immediate purpose of starting over is to clear the working context.

Activity: compare two answers

Use your request from Chapter 5 or the prepared sample in Appendix C.

1. Keep the first answer.
2. Mark one useful part.
3. Mark one part that needs work.
4. Write one follow-up request.
5. Compare the first and second answers.

Finish these sentences:

- The second answer improved because...
- I would still question...
- I would keep...
- I would verify...
- My next decision is...

Check the gate

CHECK THE GATE

A revised answer can sound better and still contain a false claim. Improvement and verification are separate jobs.

Chapter field notes

- Keep the first answer long enough to inspect it.
- Mark one useful part and one part that needs work.
- Ask for one clear change when possible.
- Start over when the conversation carries too much bad context.

Next step

Circle one claim in your current answer that would matter if it were wrong. Chapter 7 shows how to check it.

FIELD NOTE 07

7. Accuracy and the Verification Ladder



Ask. Notice. Decide.

The parking problem

Return to the seed-swap announcement from Chapter 2. The invented parking detail sounds minor. It could still send a person with limited mobility to an inaccessible entrance, cause someone to arrive late, or make a visitor believe there is no reason to call ahead.

The cost of a mistake changes the strength of the check.

You do not need the same evidence for a playful list of garden names and a current travel requirement. Verification should fit the consequence.

The four-rung ladder

Use the verification ladder when an answer contains a claim you may act on or share.

1. Original or official source

Start with the organization, document, or person responsible for the information.

For the seed swap, check the library's current event page, printed notice, or staff contact. For a bill, start with the bill and the issuing organization. For a government rule, start with the responsible agency.

An AI summary is not the original source.

2. Current and applicable information

Check the date, location, version, audience, and situation.

A rule may be accurate for another state, an earlier year, a different insurance plan, or a different kind of account. A library page from last spring may look official and still be stale.

3. Independent reliable source

When the consequence matters, compare with another reliable source that reaches the claim independently.

For a travel requirement, that might mean the government destination page plus the airline's current documentation guidance. For a product recall, it might mean the manufacturer notice plus the responsible government agency.

Independence matters. Ten websites copying the same wrong paragraph are still one weak source chain.

4. Qualified person

Use a qualified person when interpretation, diagnosis, professional judgment, or accountability matters.

The right person depends on the question: a licensed clinician, attorney, fiduciary adviser, tax professional, pharmacist, building official, benefits administrator, or another responsible expert.

The ladder is not a requirement to use all four rungs every time. Climb as high as the consequence requires.

Separate claim, source, and decision

Write three lines when a fact matters.

Claim: What does the answer say?

Source: Where will I check it?

Decision: What will I do after checking?

This simple separation prevents a polished answer from becoming an action before anyone has examined its support.

Complete conversation: a museum visit

Cal wants to plan a fictional day trip to the Harbor History Museum. He asks an AI assistant for basic information.

Request

Help me plan a visit to the Harbor History Museum on Wednesday, October 7. I need the opening hours, adult admission, parking options, and whether the main entrance is accessible. Give a source link for each claim and mark anything you cannot confirm. Today is September 1, 2026.

First answer

The Harbor History Museum is open Wednesday from 9 a.m. to 5 p.m. Adult admission is \$12. Free parking is available in the museum lot, and the main entrance is wheelchair accessible. Tickets may be purchased at the door.

The answer gives no links despite the request. Every factual detail may change. Cal does not use it as an itinerary.

Follow-up

Put each claim in a table with these columns: claim, source provided, date shown by the source, and what I still need to confirm. Do not repeat a claim without a source.

Revised answer

I do not have a verified source for the museum details in my previous answer. You should confirm the hours, admission, parking, accessibility, and ticket policy on the museum's official website or by calling the museum.

The second answer is less helpful as a plan, but more honest about the missing evidence.

Verification

Cal finds the fictional museum's official visitor page. It lists Wednesday hours as 10 a.m. to 4 p.m., adult admission as \$15, a paid city garage, and an accessible side entrance during construction. He calls the museum to ask where the accessible drop-off is located.

Decision

Cal builds the itinerary from the official page and the call. He uses the assistant only to format his confirmed notes into a checklist.

What to notice

The first answer supplied the exact categories Cal requested. It looked complete. Completeness was the problem because none of the claims had support.

The follow-up exposed that gap. The verification step found several differences that could affect cost, timing, and access.

The final task given to the assistant was safer: organize confirmed notes.

Sources that deserve caution

Be careful with:

- undated pages
- screenshots without a visible source
- search summaries that remove context
- copied articles with no original link

- forums used as proof of rules or policy
- a chatbot citing another chatbot
- sources that sell the product or service under review
- a confident answer with no source at all

These sources may provide clues. They are weak final evidence for consequential claims.

When the assistant provides citations

Open the source. Confirm that it exists, says what the answer claims, applies to the situation, and is current enough for the decision.

AI systems can produce citations that are unrelated, misquoted, or invented. A link is a path to checking, not proof by itself.

When a source is long, search within it for the relevant term. Read enough surrounding text to understand conditions and exceptions. If the language is hard to interpret and the consequence matters, ask the responsible organization or a qualified person.

Activity: build a verification plan

Use the claim you circled at the end of Chapter 6.

Claim: Write it in one sentence.

Consequence: What could happen if it is wrong?

First source: What original or official source should you check?

Currency: What date, version, place, or circumstance must match?

Second source: Does the consequence justify an independent check?

Qualified person: Who owns interpretation or accountability if the answer remains uncertain?

Decision: What will you do after checking?

Check the gate

CHECK THE GATE

Verification does not mean searching until something agrees with the answer. Begin near the original source, check that it is current and applicable, and use qualified help where interpretation matters.

Chapter field notes

- The consequence of error determines the strength of the check.
- Start with the original or official source.
- Confirm date, version, place, and situation.
- Open citations and read what they actually support.
- Use qualified people for interpretation and accountability.

Next step

Verify one low-stakes claim from your practice answer. Record the source and date. If no claim needs checking, choose one from the museum example and name the source you would use.

FIELD NOTE 08

8. Privacy, Redaction, and Tool Boundaries



Ask. Notice. Decide.

The task rarely needs the whole story

Privacy begins before you type. The useful question is simple: what information does this task actually need?

An assistant may produce a better-sounding answer when given more context. That does not mean it needs names, account numbers, full documents, precise addresses, private diagnoses, or another person's information.

Good context improves the task. Personal detail makes the situation identifiable. Sometimes those overlap. Your job is to reduce the overlap.

A redaction example

Too much information

My sister Maria Lopez, age 72, lives at 18 Cedar Lane and has diabetes. Help me write questions for her appointment with Dr. Nguyen on October 4. Her insurance member number is 8472-19-553.

Smaller, safer request

A family member has a chronic health condition. Help me prepare general questions for a medical appointment. Do not diagnose, recommend treatment, or interpret test results.

The second request may still help someone prepare. It removes the name, age, address, clinician, date, insurance number, and specific diagnosis.

If a clinician needs the exact facts, share them through the clinician's approved process, not a general AI conversation.

Five redaction questions

Before sending a request, ask:

1. Does the task need a real name?
2. Does it need an exact address, date of birth, account number, or record identifier?
3. Does it need the whole document or only one paragraph?
4. Am I sharing information about another person?
5. Could a fictional or generalized example produce a useful template?

Cross out every detail that does not earn its place.

Information to keep out by default

- passwords, access codes, and recovery answers
- Social Security, tax, passport, license, or account numbers
- full home addresses when the task does not require them
- private medical records or images
- confidential work, client, student, or customer information
- legal documents containing identifying or privileged details
- financial statements and payment information
- private information about another person
- security procedures or keys

Your organization may have stricter rules. Follow them.

Product settings are part of the picture

Consumer AI products may offer controls for model improvement, chat history, temporary conversations, memory, deletion, data export, and connected apps. Business, education, or employer-managed products may use different defaults and administrative policies.

The location and meaning of these controls can change. Review the current documentation for the product and account you use. If an employer, school, nonprofit, or client provides the tool, check its policy before entering organizational information.

Settings can reduce certain uses or retention. They do not turn unnecessary disclosure into good practice.

Connected apps deserve a separate decision

Some assistants can connect to email, calendars, cloud drives, or other services. A connection may ask for permission to read or act on information in that service. The exact permissions and available controls depend on the product, account, and organization.

Before connecting an app:

- read the permission request
- identify which account is being connected
- check whether an administrator controls access
- decide whether the benefit is worth the scope
- know how to disconnect the app
- avoid authorizing a connection simply to complete a small practice task

A first lesson in AI does not require access to your inbox or files.

Complete conversation: explaining a bill

Diane receives a fictional medical bill. She wants help understanding several terms but does not want to upload the document.

She copies only these non-identifying lines:

Amount billed: \$240
Plan adjustment: \$90
Insurance payment: \$100
Patient responsibility: \$50
Remark: service subject to deductible

Request

Explain these billing terms in general plain language. Do not tell me whether the bill is correct or what my specific insurance plan should cover. List questions I can ask the billing office or insurer.

First answer

The provider billed \$240. A \$90 plan adjustment reduced the allowed amount, and insurance paid \$100, leaving \$50 for you. “Subject to deductible” means your insurer will not pay this amount because you have not met your annual deductible. You should pay the \$50 balance.

The arithmetic may be clear, but the explanation makes plan-specific claims and tells Diane to pay.

Follow-up

Remove conclusions about my plan and remove payment advice. Explain each line as a general billing term. Then give me questions to ask before I decide what to do.

Revised answer

General explanation:

- Amount billed is the provider's original charge.
- A plan adjustment is an amount removed or changed under the insurer's agreement with the provider.
- Insurance payment is the amount the insurer reports paying.
- Patient responsibility is the amount currently assigned to the patient on this statement.
- "Subject to deductible" usually refers to costs counted under a plan's deductible rules. The exact meaning depends on the plan and claim.

Questions to ask:

1. Does the \$50 match the insurer's explanation of benefits?
2. Which service line was applied to the deductible?
3. Is the claim final, or is any review still pending?
4. Who should correct the record if the bill and explanation of benefits differ?

Verification and decision

Diane compares the statement with the insurer's explanation of benefits. She calls the billing office using the number printed on the official statement. She does not use the assistant's first payment instruction.

What to notice

Diane shared only the lines needed to understand the terms. She did not upload a page containing her name, patient number, provider, insurer, address, diagnosis code, or barcode.

The revised answer stays within general explanation and question preparation. The real account decision remains with Diane, the billing office, and the insurer.

If you already shared too much

Stop adding information. Save only the material you need. Review the product's current deletion, history, memory, and privacy controls. If the information belongs to an employer, client, student, patient, or other person, follow the organization's incident or privacy process.

Do not rely on a new conversation as proof that earlier information is gone. Use the product's documented controls and the responsible support channel.

Activity: redact before asking

Rewrite this fictional request so it keeps only the information needed for a general template.

My neighbor Thomas Reed at 41 Oak Street owes our club \$185 in dues and has ignored three calls. His wife said he lost his job. Write a threatening letter that makes him pay by Friday.

Consider:

- Which personal details should be removed?
- What tone and purpose should change?

- Does the sender need a template, a factual account review, or qualified advice?
- Which facts should be confirmed before any message is sent?

A possible revision appears in Appendix E.

Check the gate

CHECK THE GATE

Privacy controls matter. Data minimization matters first. Use the least personal information that can still produce a useful result.

Chapter field notes

- Remove names, numbers, records, and details the task does not need.
- Use fictional or generalized examples when possible.
- Check the current settings and policy for the product and account you use.
- Treat connected apps as a separate permission decision.
- Use approved organizational processes for sensitive information.

Next step

Review the request you wrote in Chapter 5. Cross out every detail that does not change the result. Save the redacted version as your working request.

FIELD NOTE 09

9. High-Stakes Decisions and Qualified Help



Ask. Notice. Decide.

Preparation and decision are different jobs

An AI assistant can help you prepare for an important conversation. It can organize notes, explain general terms, suggest questions, or help you create a checklist. It should not quietly become the person making a medical, legal, financial, safety, employment, or emergency decision.

The boundary is easier to keep when you name the two jobs.

Preparation: gather questions, organize known facts, identify missing information, make a readable summary, or create a discussion list.

Decision: diagnose, prescribe, interpret a law, choose an investment, determine eligibility, resolve a safety threat, sign an agreement, or take another consequential action.

Use the assistant for preparation. Keep the decision with the person who has the authority, qualifications, context, and accountability to make it.

Why high-stakes answers need a person

High-stakes situations often depend on details that are easy to miss and hard to interpret. A medication question may depend on dose, timing, allergies, other medicines, kidney function, or symptoms. A legal question may depend on jurisdiction, dates, contract language, and facts that change the available options. A financial question may depend on taxes, time horizon, risk, benefits, debt, and family obligations.

An AI answer may simplify the wrong detail, use information from another jurisdiction, overlook an exception, or present an uncertain interpretation as settled. Even a correct general answer may be wrong for one person's situation.

A qualified person can ask follow-up questions, review records through an appropriate process, explain uncertainty, and accept professional responsibility. The AI assistant cannot replace that relationship.

Five boundaries to remember

Health and medication

Use AI to prepare general questions, organize non-identifying notes, or translate terminology you will confirm. Use a licensed clinician or pharmacist for diagnosis, treatment, dose, interaction, or urgent symptom decisions.

If a situation may be an emergency, contact the appropriate emergency service or urgent professional resource. Do not wait for a chatbot.

Legal rights and obligations

Use AI to make a list of terms you want explained, organize dates you have already confirmed, or prepare questions for an attorney or responsible agency. Use a qualified legal professional or official source for rights, deadlines, legal strategy, signing, or dispute decisions.

Money, taxes, and benefits

Use AI to organize questions, create a budget category list, or explain general terms. Use the responsible plan administrator, tax professional, fiduciary adviser, benefits office, or financial institution for decisions that affect money, taxes, benefits, or eligibility.

Safety and emergencies

Use established emergency, public-safety, product-safety, or organizational procedures. Do not ask an AI assistant to decide whether a threat is real, whether an evacuation is necessary, or whether dangerous instructions are safe to attempt.

Employment and other people's opportunities

Use AI to organize your own notes or improve a message. Do not use an unreviewed AI answer to decide who receives a job, benefit, service, disciplinary action, or other opportunity. Human review must include the actual criteria, relevant evidence, policy, and accountability for unfair or incorrect outcomes.

Complete conversation: preparing for a medical appointment

The following example is fictional and stays general.

Nora wants to prepare questions for an appointment about recurring dizziness. She does not want a diagnosis from the assistant.

Request

Help me prepare general questions for a licensed clinician about recurring dizziness. Do not diagnose, suggest a cause, recommend treatment, or tell me whether the situation is urgent. Organize the questions under symptoms, timing, medicines, and follow-up. Remind me to use emergency services if I believe I am in immediate danger.

First answer

Your dizziness may be caused by dehydration or low blood pressure. Try drinking more water and standing up slowly. Ask your doctor whether you need blood tests.

The answer ignores the boundary. It suggests causes and treatment.

Follow-up

Remove every possible cause and every treatment suggestion. Give only neutral questions I can answer for myself or ask the clinician. Include a short emergency reminder without judging my symptoms.

Revised answer

Questions to prepare:

Symptoms

- How would I describe the feeling in my own words?
- What other symptoms happen at the same time?

Timing

- When did this begin?
- How often does it happen, and how long does it last?
- What was I doing when it started?

Medicines and health information

- Which medicines, supplements, or recent changes should I report?
- Which health history does the clinician need?

Follow-up questions for the clinician

- What information would help you evaluate this?
- What warning signs should lead me to seek immediate care?
- Who should I contact if the symptoms change?

If you believe you are in immediate danger, contact the appropriate emergency service now.

Decision

Nora uses the list to organize her own notes. She brings her current medicine list through the clinician's approved process and asks the clinician which information matters. She does not use the first answer's suggestions.

What to notice

The first prompt included a clear boundary. The assistant crossed it anyway. A safety instruction in the prompt did not remove the need to inspect the answer.

The revised answer supports preparation. The clinician still evaluates the symptoms and owns the medical guidance.

When the answer sounds urgent

An AI assistant may sound alarmed or reassuring. Neither tone should determine your response. Use the real-world procedure appropriate to the situation.

For immediate danger, contact emergency services or the designated urgent resource. For a medication question, contact a pharmacist or clinician. For a legal deadline, contact a qualified attorney or the responsible court or agency. For a suspected financial fraud, use the institution's official fraud channel.

Do not spend valuable time arguing with a chatbot about whether the situation counts.

Activity: name the owner

For each situation, write who owns the final decision.

1. An AI assistant summarizes questions about a new prescription.
2. An AI assistant drafts a list of terms from a lease.
3. An AI assistant groups household spending into categories.
4. An AI assistant suggests wording for a workplace accommodation request.
5. An AI assistant explains a product recall notice.

The answer may be you, a pharmacist, a clinician, an attorney, a benefits administrator, a financial professional, a government agency, a manufacturer, or another responsible person. More than one person may share the process. The AI assistant is never the accountable owner.

Check the gate

CHECK THE GATE

Ask, “Who has the qualifications, context, authority, and responsibility to make this decision?” Use AI to prepare for that person, not to remove them from the process.

Chapter field notes

- Preparation and decision are different jobs.
- High-stakes questions depend on context the assistant may not have.
- A clear prompt boundary can still be ignored.
- Use established emergency and professional channels when consequence matters.

Next step

Review your practice task. Write the name or role of the person who owns the final decision. If the task is fully yours, write what source you will check before acting.

FIELD NOTE 10

10. Common Problems and Troubleshooting



Ask. Notice. Decide.

Weak answers are ordinary

An AI assistant may misunderstand the request, produce too much text, repeat itself, make up a detail, refuse a harmless task, or drift into a tone you would never use. The interface may move. The internet may fail. An account may ask for a setting you have never seen.

Troubleshooting works best when you separate the problem with the answer from the problem with the tool.

When the answer is too vague

Add the situation and the result you want.

Weak request

| Help with my letter.

Clearer request

| Explain the second paragraph of this fictional association letter in plain language. Separate what the paragraph clearly says from questions I should ask the association.

If the assistant still gives general advice, tell it to stay with the provided text.

When the answer is too long

Ask for a shorter shape.

- Keep the answer under 150 words.
- Give me five bullets.
- Put the steps in order.
- Give me the one-paragraph version first.
- Keep only details that change the decision.

Length limits work better when you also say what must stay.

Cut this to 100 words. Keep the date, time, location, reply deadline, and contact role.

When the tone is wrong

Describe the intended relationship and give a short example of the tone.

Rewrite this for neighbors I know. Keep it warm and direct. Avoid sales language, exclamation points, and claims about how everyone feels.

You can also ask for two options and combine the useful parts yourself.

When the answer invents details

Name the problem plainly.

Remove every detail I did not provide. Mark missing facts with [confirm]. At the end, list any assumption that remains.

Then compare the revision with your source. If the unsupported detail matters, verify it outside the conversation.

If the assistant repeats the invention, start a new conversation with a clean request and the confirmed facts only.

When the answer misunderstands the task

State the job in one sentence and show the desired output.

I need a checklist, not a letter. Use these headings: before the event, day of the event, and after the event. Put each note under one heading.

If the request contains several jobs, split them.

1. First, explain the paragraph.
2. Then, after you approve the explanation, ask for questions to verify.
3. Finally, ask for a short summary.

Smaller turns are easier to inspect.

When the assistant refuses

Some refusals protect against harmful or sensitive use. Do not try to trick the tool around a safety boundary.

For a harmless task, remove wording that makes the request look broader or riskier than it is. Ask for general education, neutral organization, or questions for a qualified person.

Broad request

Tell me how to win my dispute with the contractor.

Safer, clearer request

Help me organize the dates, invoices, and questions I have already identified for a conversation with a licensed attorney or the local consumer office. Do not give legal advice or predict the outcome.

If the tool still refuses, use another appropriate source or ask a person. Completing the task is more important than persuading the model.

When the assistant asks for more private detail

Pause. Ask whether the detail is necessary.

Explain why that information would change the answer. Offer a version of the task that uses fictional or non-identifying details.

You can also skip the question, generalize the detail, or stop the conversation. Do not supply private information merely because the assistant requested it.

When the conversation goes sideways

Start over with a clean request when earlier context keeps affecting the answer.

Before you start over:

- copy any useful sentence you want to keep
- remove private details from the new request
- state the task in one sentence
- include only confirmed facts
- add one clear uncertainty rule

Starting over is a normal working choice. It is not a failure.

When the screen looks different

Buttons and menus change. Look for the purpose of the action rather than the exact label.

You usually need only a few moves:

1. Start a new conversation.
2. Type or speak in the message area.
3. Send the request.
4. Stop a response if it becomes irrelevant or uncomfortable.
5. Add a follow-up in the same conversation.
6. Copy the material you decide to keep.

If a product asks you to connect an app, upload a file, enable memory, or change a data setting, stop and read the request. Those are separate choices, not required steps in basic practice.

When you cannot sign in

Do not create a new account under pressure. Check the address of the official service, use the documented account-recovery process, or ask the organization providing the workshop for help.

Never share a password, one-time code, recovery phrase, or security answer with an AI assistant, facilitator, or another participant.

You can continue learning with the paper examples while the account issue is resolved.

When the internet or live demo fails

Use a prepared conversation. Read the request, first answer, follow-up, and revised answer. Mark what is useful and what needs checking. Write the final decision.

The skill transfers. You are practicing supervision, not internet speed.

When voice input creates mistakes

Speech-to-text can mishear names, dates, numbers, or uncommon words. Review the text before sending it.

For a long request:

- speak one sentence at a time
- pause and check dates and numbers
- replace names with roles when possible
- delete unintended private information
- use the keyboard to correct the final request

Voice input can improve access. It still needs the same privacy and accuracy check.

When copying and pasting brings extra material

A copied passage may include names, headers, tracking text, signatures, account numbers, or earlier conversation content. Paste into a plain note first if you need to inspect it. Remove everything outside the paragraph or list required for the task.

If the document is confidential, use the approved process or do not paste it.

Troubleshooting table

Problem	First move	Next check
Too vague	Add the situation and desired result	Did you name the audience and task?
Too long	Set a length and required details	Did the shorter answer drop something important?

Problem	First move	Next check
Wrong tone	Describe the relationship and tone	Does the result sound like the setting?
Invented detail	Remove unsupported facts and mark gaps	What source will confirm the claim?
Repeated mistake	Start a new conversation	Did you carry over only confirmed context?
Refusal	Narrow the request to safe preparation	Does the task belong with a qualified person?
Private question	Generalize, skip, or stop	Does the task need that detail?
Interface change	Look for the purpose of the action	Is the product asking for a new permission?
No access	Use paper practice or official recovery	Are you on the official service?

Complete troubleshooting example

Sam wants help turning garage-sale notes into an announcement.

First request

Write a garage-sale ad from these notes: Saturday, 8 to 1, household items, books, garden tools, cash only.

First answer

Huge Multi-Family Garage Sale! Saturday from 8 a.m. to 1 p.m. at 427 Maple Avenue. Shop furniture, antiques, children's clothes, books, garden tools, and much more. Early birds welcome. Cash and Venmo accepted.

The assistant invents the address, sale type, merchandise, early-bird rule, and payment option.

Sam's repair

Start over. Use only these facts: Saturday, 8 a.m. to 1 p.m., household items, books, garden tools, cash only. Write a plain 50-word announcement. Put [add address] where the location belongs. No hype and no other details.

Revised answer

Garage sale Saturday from 8 a.m. to 1 p.m. at [add address]. Household items, books, and garden tools will be available. Cash only.

Decision

Sam adds the address only in the final posting location where he intends to share it. He checks the platform's privacy and location settings before publishing.

Activity: diagnose the problem

Choose one weak answer from your practice. Complete these lines:

- The answer's main problem is...
- The smallest useful repair is...
- The detail I must verify is...
- The information I should remove is...
- I will revise, start over, use another source, or ask a person because...

Check the gate

CHECK THE GATE

Troubleshooting should make the task smaller, clearer, and safer. If each repair requires more private information or more trust, stop and choose another route.

Chapter field notes

- Diagnose the problem before adding more instructions.
- Use one clear repair at a time.
- Start over when earlier context keeps causing trouble.
- Paper examples preserve the learning when technology fails.
- Account, permission, and connected-app requests deserve a separate decision.

Next step

Write down the troubleshooting move you are most likely to need: shorten, clarify, change tone, remove guesses, start over, or ask a person.

FIELD NOTE 11

11. Everyday Playbooks and Case Studies



Ask. Notice. Decide.

Pick the playbook that fits the job

The best AI task begins with a real use, not a tour of features. This chapter offers several playbooks you can adapt. Each one keeps the same routine while changing the task.

You do not need to try all of them. Choose one that resembles something you already do. Familiar context makes it easier to judge the answer.

Every playbook includes:

- a suitable task
- a request pattern built with LEAD
- a likely problem
- a follow-up move
- a verification route
- a human decision

Read each case through the AND loop. Ask gives Scout direction. Notice catches what the first answer missed or invented. Decide keeps the final action with Boomer, which means the person responsible for the real situation.

Playbook 1: Understand a difficult letter

Good use

Ask for a plain-language explanation of one paragraph you provide. Separate the source's actual statement from general explanation and questions.

Keep out

Remove names, addresses, account numbers, claim numbers, barcodes, signatures, and unrelated pages. Do not paste a confidential or privileged document into a general tool.

Request pattern

Explain the source paragraph below in plain language. First state what the paragraph clearly says. Then list words or questions I should confirm with the organization that sent it. Do not give legal, financial, or medical advice. Do not assume facts outside the paragraph.

Source paragraph:

[paste the redacted paragraph]

Likely problem

The assistant may add advice, deadlines, rights, or next steps that are common in similar letters but absent from yours.

Follow-up

Remove every conclusion that does not come from the source paragraph. Put general background in a separate section labeled “General context to confirm.”

Verify and decide

Read the original letter again. Use the sender's official contact information, current policy, or a qualified adviser when the meaning affects a decision. Treat the AI explanation as a reading aid.

Case study: the recreation notice

The fictional notice says:

Beginning November 1, reservations for the activity room will be accepted on a rolling 60-day basis. Existing recurring reservations will not automatically renew. Groups seeking weekly use must submit a new request for each calendar quarter.

Request

Explain this notice in plain language for a volunteer group leader. Use only the text provided. Then list questions the leader should ask the recreation office before requesting dates.

First answer

Starting November 1, you can reserve the room up to 60 days in advance. Current weekly reservations end on December 31. To keep a weekly time, submit one new request every three months and pay the quarterly reservation fee.

The answer invents an end date and a fee.

Follow-up

Remove the end date and fee. The notice does not provide them. Rewrite the explanation, then turn the unknown points into questions.

Revised answer

Starting November 1, activity-room reservations will be accepted on a rolling 60-day schedule. Recurring reservations will not renew automatically. A group seeking weekly use must submit a new request for each calendar quarter.

Questions for the recreation office:

1. When does the current recurring reservation end?
2. When may we submit the first new quarterly request?
3. Are there fees or other requirements?
4. How will we be told whether the request is approved?

The group leader checks the full policy and calls the recreation office before changing the schedule.

Playbook 2: Plan a local outing or trip

Good use

Use the assistant to organize confirmed options, build a checklist, compare routes you provide, or suggest questions to verify.

Keep out

Avoid sharing passport numbers, reservation codes, loyalty numbers, exact home departure details, or another person's mobility or medical information. Describe access needs generally when that is enough.

Request pattern

Help me plan a day trip to [place] on [date]. I care about opening hours, total walking, accessible entrances, parking or transit, food options, and a quiet break. Mark every current fact that needs verification. Separate suggestions from confirmed information.

Likely problem

Hours, prices, routes, construction, ticket rules, and access details can change. The assistant may combine facts from different dates or locations.

Follow-up

Turn this into a verification checklist. For each claim, name the official source or person I should consult. Do not repeat the claim as confirmed.

Verify and decide

Check the official venue, transit provider, weather service, reservation, and accessibility contact close to the visit date. Build the final itinerary from confirmed details.

Case study: two possible gardens

Miguel wants a low-walking outing with a friend. He asks for a comparison of the fictional River Arboretum and North County Garden.

Request

Compare two places for a Wednesday morning visit using only the notes I provide. Do not add hours, prices, or accessibility claims. My priorities are short walking distances, shaded seating, and an indoor place to rest.

River Arboretum notes: paved central loop, benches shown on map, visitor center, parking near entrance.

North County Garden notes: tram mentioned on brochure, cafe, several gravel paths, parking distance unknown.

First answer

River Arboretum is the better choice because its paved loop is only half a mile and the visitor center is air conditioned. North County Garden's free tram runs every 20 minutes, but the gravel paths may be difficult.

The assistant adds a distance, air conditioning, price, and schedule.

Follow-up

Remove every unsupported detail. Compare only what my notes say. Add a separate list of facts to confirm with each garden.

Revised answer

River Arboretum

- The notes identify a paved central loop.
- Benches appear on the map.
- A visitor center and nearby parking are listed.

North County Garden

- The brochure mentions a tram and a cafe.
- Several paths are gravel.
- The parking distance is unknown.

Confirm before choosing

- Current hours and admission
- Loop distance and grade at River Arboretum
- Indoor seating and climate control at both sites
- Tram schedule, cost, and accessibility at North County Garden
- Parking and drop-off distance at both sites

Miguel calls both visitor offices. He makes the choice from the confirmed access details and the weather forecast.

Playbook 3: Work with recipes and meal ideas

Good use

Ask for ideas using ingredients you have, a shopping list from a recipe you provide, a smaller batch, or a clearer cooking sequence.

Keep out

Do not rely on a general AI answer for severe allergies, food safety, medication-related dietary restrictions, infant feeding, or a medically prescribed diet. Use a qualified clinician, registered dietitian, official food-safety source, or product label where appropriate.

Request pattern

Suggest three simple dinners using canned beans, rice, frozen spinach, onions, and common pantry seasonings. Each option should use one pan or pot and take about 30 minutes. Do not assume I have other fresh ingredients. List optional additions separately.

Likely problem

The assistant may add ingredients you do not have, give unrealistic timing, or overlook a safety issue.

Follow-up

Revise option two using only my listed ingredients plus oil, salt, and water. Put the steps in order and mark any cooking time as an estimate.

Verify and decide

Use package instructions, a trusted recipe, and official food-safety guidance when temperature or storage matters.

Choose the idea that fits your actual ingredients and needs.

Complete conversation: scale a recipe

Helen has a soup recipe that serves eight and wants a shopping list for four. She provides the ingredient list.

Request

Scale this ingredient list from eight servings to four. Show the arithmetic for each item. Do not change the ingredients or add substitutions.

2 tablespoons oil; 2 onions; 4 carrots; 3 cans beans; 8 cups broth; 2 teaspoons dried herbs.

First answer

For four servings: 1 tablespoon oil, 1 onion, 2 carrots, 1 can beans, 4 cups broth, and 1 teaspoon dried herbs.

The assistant halves most items but changes three cans of beans to one can instead of one and a half.

Follow-up

Recheck each quantity by multiplying by 0.5. Show the original amount, calculation, and result. Do not round until the final column.

Revised answer

- Oil: $2 \text{ tablespoons} \times 0.5 = 1 \text{ tablespoon}$
- Onions: $2 \times 0.5 = 1 \text{ onion}$
- Carrots: $4 \times 0.5 = 2 \text{ carrots}$
- Beans: $3 \text{ cans} \times 0.5 = 1.5 \text{ cans}$
- Broth: $8 \text{ cups} \times 0.5 = 4 \text{ cups}$
- Dried herbs: $2 \text{ teaspoons} \times 0.5 = 1 \text{ teaspoon}$

Helen checks the arithmetic herself. She decides whether to use one or two cans based on the desired texture rather than letting the assistant hide the rounding choice.

Playbook 4: Preserve family history

Good use

Turn your own notes into an interview outline, organize a transcript, create topic labels, or draft neutral follow-up questions.

Keep out

Family stories may include private information about living people, health, conflict, adoption, finances, immigration, or legal matters. Ask permission before recording, uploading, or sharing another person's story. Remove unnecessary identifying details.

Request pattern

Help me create ten open-ended questions for a family-history interview about school, work, music, neighborhood life, and holiday traditions. Avoid questions that assume the person had a happy childhood or wants to discuss private family conflict.

Likely problem

The assistant may write leading questions, turn uncertainty into fact, or smooth a person's voice into generic prose.

Follow-up

Rewrite the questions so they do not suggest an expected answer. Add two permission questions about topics the person would rather skip and how the recording may be shared.

Verify and decide

Keep names, dates, and places labeled as remembered, documented, or uncertain. Confirm quotations against the recording. Let the person review sensitive passages before sharing.

Mini-example: preserve the uncertainty

Interview note

Aunt says the family moved to Dayton around 1958, maybe the summer before her junior year. She remembers a red brick school but not the name.

Weak summary

The family moved to Dayton in summer 1958, where she attended Jefferson High School.

Better follow-up

Rewrite the note without adding a school name or exact date. Preserve what she remembers and what remains uncertain.

Revised summary

She remembers the family moving to Dayton around 1958, possibly during the summer before her junior year. She recalls attending a red brick school but does not remember its name.

The uncertainty is part of the record. Do not polish it away.

Playbook 5: Support volunteer work

Good use

Draft a reminder from confirmed notes, organize a supply list, build a shift checklist, summarize meeting notes you are allowed to share, or prepare questions for an event lead.

Keep out

Remove volunteer phone numbers, addresses, participant records, donor information, student details, access codes, and confidential organizational material. Follow the nonprofit's data policy.

Request pattern

Turn these confirmed notes into a volunteer checklist for the morning of the event. Use the headings setup, arrival, activity, and cleanup. Do not assign people or invent times. Mark missing owners with [assign].

Likely problem

The assistant may assign tasks to people, invent supplies, or add policy language from another kind of event.

Follow-up

Remove every task and supply that is absent from my notes. Put unassigned items under "Owner needed."

Verify and decide

The event lead checks the list against the actual plan, safety requirements, facility rules, and volunteer availability. A person assigns the work.

Playbook 6: Learn a hobby or skill

Good use

Ask for a practice plan, a plain explanation, questions to guide observation, or ways to break a project into smaller steps.

Keep out

Avoid unsafe instructions for tools, chemicals, electrical work, firearms, climbing, food preservation, or other activities where technique and conditions matter. Use an instructor, manual, official safety source, or qualified professional.

Request pattern

I am learning watercolor and want a 20-minute practice session using one brush, one color, and plain paper. Give me three exercises that focus on water control. Use simple instructions and include one thing to observe after each exercise.

Likely problem

The assistant may assume equipment, use undefined terms, or give too many exercises.

Follow-up

Define “wash” in one sentence. Keep only two exercises. Describe what the paper should look like if I used too much or too little water.

Verify and decide

Compare advice with a trusted book, instructor, manufacturer guidance, or your own observation. Use the assistant to structure practice, not to certify technique.

Complete conversation: learn a bird song

Arthur wants to learn the difference between two common bird songs. He does not want the assistant to identify a recording as certain.

Request

Create a short listening practice for comparing two bird songs using recordings from a reputable birding organization. Focus on rhythm, repetition, and pitch direction. Do not identify a bird from my description. Give me a note-taking template.

First answer

The first bird is definitely a Carolina wren because its song sounds like “tea-kettle, tea-kettle.” The second is a northern cardinal. Listen for the wren's three-part phrase and the cardinal's whistle.

The answer claims identifications that Arthur did not ask for and has no recordings to support.

Follow-up

Remove the species identifications and memory phrases. Give me a neutral comparison template I can use while listening to labeled recordings from an official birding source.

Revised answer

For each labeled recording, note:

- Phrase length: short, medium, or long
- Repetition: repeated evenly, repeated with pauses, or changing
- Pitch direction: rising, falling, level, or mixed
- Tempo: steady, speeding up, or slowing down
- One feature you can recognize on a second listen

Compare your notes only after listening twice to each recording.

Arthur uses labeled recordings from a reputable organization and treats his notes as practice, not field identification proof.

Playbook 7: Prepare for a conversation

Good use

Organize what you know, list questions, identify missing documents, or rehearse a calm opening for a conversation with a professional, service provider, family member, or organization.

Keep out

Do not use the assistant to impersonate another person, manipulate someone, diagnose motives, or predict how a sensitive conversation will end. Remove private information about people who have not agreed to share it.

Request pattern

Help me prepare for a conversation with a home-repair contractor about a delayed project. Organize my confirmed facts, questions, and requested next steps. Keep the tone calm and direct. Do not make legal claims or accuse anyone of intent.

Likely problem

The assistant may write a threatening script, invent contract rights, or add emotional conclusions.

Follow-up

Remove legal conclusions and statements about motive. Give me a factual opening, five questions, and a place to record the contractor's answer.

Verify and decide

Review the actual contract, dates, invoices, and communication. Use qualified help if the dispute involves legal rights or a major loss. Decide your response after hearing the responsible person's answer.

Case study: questions for a benefits office

Frank sees an unfamiliar deduction on a fictional benefits statement.

Request

Help me prepare neutral questions for the benefits office about an unfamiliar deduction. Do not decide whether it is correct, interpret eligibility, or tell me to stop payment. I want to ask what the deduction is, when it began, which plan document applies, and how to request a review.

Answer

1. What is the exact name and purpose of this deduction?
2. On what date did it begin?
3. Which enrollment record or plan document authorizes it?
4. Does the amount vary by pay period?
5. Who can provide a written explanation?
6. What is the process and deadline for requesting a review?
7. What documents should I bring or submit?

Frank removes his employee number before using the assistant. He then contacts the benefits office through the official channel and records the representative's answer.

Playbook 8: Organize a home project

Good use

Turn your own notes into phases, a shopping checklist, questions for a contractor, or a record of decisions.

Keep out

Do not rely on general AI instructions for electrical, gas, structural, roofing, chemical, mold, asbestos, fire-safety, or other hazardous work. Use permits, codes, manufacturer instructions, building officials, and licensed professionals.

Request pattern

Organize my notes for repainting a small bedroom into preparation, supplies, work sequence, and cleanup. Use only my notes. Put safety or product questions under “Confirm before starting.” Do not add technical instructions.

Likely problem

The assistant may add unsafe methods, assume product compatibility, or give a cost and schedule with no basis.

Follow-up

Remove all instructions that are not in my notes. Keep only organization and questions. Add a column for who will confirm each safety question.

Verify and decide

Check product labels, building requirements, surface conditions, and professional guidance. Use the organized list as a planning record.

Playbook 9: Handle a suspicious message

Good use

Use the assistant to separate the claims in a message, identify questions to ask, or create a calm checklist for checking the message through an official channel.

Keep out

Do not click a link, open an attachment, call a number in the suspicious message, or paste a password, verification code, account number, or full financial statement into an AI tool. An AI assistant cannot declare a message safe.

Request pattern

I received the fictional message below. List the claims it makes, the pressure tactics it uses, and the facts I would need to verify. Do not decide whether it is genuine. Do not tell me to use any link, phone number, or address in the message. Build a checklist for contacting the organization through a channel I find independently.

Likely problem

The assistant may sound certain that the message is genuine or fraudulent. It may invent facts about the sender, repeat a dangerous link, or suggest contacting the number in the message.

Complete case study: the unpaid toll text

Nora receives this fictional text:

FINAL NOTICE: You owe \$6.84 for an unpaid road toll. Pay by 6 p.m. today to avoid a \$75 penalty and vehicle suspension. Visit road-pay-now.example or call 555-0197.

She does not click the link. She takes a screenshot, removes her phone number and notification details, and writes a LEAD request.

Lay out the situation: A text claims that a small toll is overdue and threatens a larger penalty today.

Explain the job: Separate the claims, pressure language, and questions to verify.

Add limits: Do not decide whether the text is genuine. Do not repeat or recommend the link or phone number. Do not ask for account details.

Define the voice: Calm checklist in plain language.

Complete request

A fictional text says a small road toll is overdue and threatens a much larger penalty today. Separate its claims, pressure language, and the questions I should verify. Do not decide whether it is genuine. Do not repeat or recommend the contact information in the text. Give me a calm checklist for checking through an official source I find independently.

First answer

This is definitely a scam. The state toll authority never sends text messages, and the web address is not legitimate. Delete it immediately and block the sender.

Notice

The answer may be directionally cautious, but it makes unsupported claims about the state authority and the web address. Nora did not identify a state or road system. “Definitely” turns a sensible concern into a conclusion the assistant has not earned.

Follow-up

Remove the verdict and every claim about what a particular toll authority does. Give me only a verification checklist. Start with opening the official app or website I already use, or finding the agency through a trusted search or prior statement. Include a reminder not to use contact information from the text.

Revised answer

Verification checklist:

1. Do not click the link or call the number in the text.
2. Open the official toll account or app you already use, or locate the responsible agency independently.
3. Check for an unpaid toll using the agency's normal process without sharing a verification code with anyone.
4. Compare the date, road, vehicle information, and amount with your own records.
5. If the account is unclear, contact the agency through contact information from its official source or a prior statement.
6. Use the agency's reporting process if the message proves unrelated to your account.

Verify and decide

Nora checks through a source she found independently. She does not let the assistant's confidence determine whether the message is safe. She decides what to report or delete after checking the real account.

Try it with your own version

Write down the claim, the deadline or pressure, and the independent channel you would use. Leave every account number and verification code off the page.

Playbook 10: Organize a photo project

Good use

Ask for a folder plan, filename pattern, scanning checklist, interview questions for identifying people, or a workflow for separating confirmed information from family guesses.

Keep out

Photos can reveal faces, homes, documents, school names, locations, and family relationships. Get permission before uploading another person's image. Use local organization when possible, and decide deliberately whether a cloud tool should receive the files.

Request pattern

Help me plan a photo-organizing project. I have printed photos and digital copies from several relatives. Create a small first-week workflow for sorting by decade, family branch, and confidence in the identification. Do not suggest face recognition or automatic public sharing. Preserve uncertain names and dates as uncertain.

Likely problem

The assistant may recommend a service you did not ask for, suggest uploading everything at once, or turn a tentative caption into a fact.

Complete case study: the reunion archive

Cal has two boxes of reunion photos and a folder of scans. Some captions are written on the back. Other names come from memory. He wants a plan that he and his sister can use together.

First request

Help me organize old family photos.

First answer

Upload the collection to a photo service with face recognition. The service will identify relatives, remove duplicates, arrange the pictures by date, and make an album you can share with the family.

Notice

The answer assumes that Cal wants the photos online, that automated identification is acceptable, and that dates can be recovered reliably. It also skips the difference between a written caption, a relative's memory, and an unknown identity.

Cal rewrites the request with LEAD.

Clearer request

I have two boxes of printed reunion photos and a folder of scans. My sister and I want a local organizing plan before we choose any sharing service. Create a three-session workflow: inventory, tentative identification, and scanning priorities. Use labels for confirmed, remembered, and unknown information. Do not recommend face recognition, public sharing, or uploading the full collection. Keep each session under 45 minutes and use a calm checklist.

Revised answer

Session 1: Inventory

- Number each box and folder.
- Count broad groups without identifying every person.
- Note physical condition and any writing on the back.
- Create three trays or folders: ready to review, needs careful handling, and duplicate candidate.

Session 2: Tentative identification

- Record the image number.
- Copy any written caption exactly and label it “written on photo.”
- Add remembered names or dates under “family memory.”
- Mark disagreement or missing information as “unknown.”

Session 3: Scanning priorities

- Begin with fragile images and photos with clear captions.
- Record the filename, source box, and information status.
- Keep the original image unchanged and make edits on a copy.
- Decide with your sister which images may be shared and with whom.

Notice, verify, and decide

Cal and his sister check every copied caption against the actual photo. They preserve disagreement rather than forcing one answer. They choose the storage and sharing method only after discussing privacy with the relatives pictured.

Try it with your own version

Choose ten photos, not ten boxes. Define one label for confirmed information and one for uncertainty. Decide who must agree before anything is shared.

Playbook 11: Learn a phone or tablet task

Good use

Use the assistant to translate official instructions into smaller steps, create a practice checklist, explain an unfamiliar term, or help you prepare a question for device support.

Keep out

Do not share passwords, verification codes, account recovery details, serial numbers, or screenshots that expose messages and contacts. Menu names and button locations change by device model, software version, language, and accessibility settings.

Request pattern

I want to learn one task on my device. Ask me for the device model and software version without asking for account information. Use only the official instructions I provide. Break the task into short numbered steps, tell me what I should see after each step, and include a safe way to stop.

Likely problem

The assistant may give instructions for a different device, invent a menu name, or rush past a screen that requires permission or payment.

Complete case study: make text easier to read

Evelyn wants larger text on her tablet. She knows the model but does not know the software version. She starts with a broad request.

First request

Make the words bigger on my tablet.

First answer

Open Control Center, press the “Aa” button, and move the Text Size slider to 150 percent. This changes all apps permanently.

Notice

The answer assumes an operating system, a menu, and the effect of one control. Evelyn cannot tell whether the instruction matches her tablet.

Follow-up using LEAD

I want to increase reading text on my tablet without changing anything else. I do not know the software version. First tell me how to find the model and version using the device's own information screen, without asking for a serial number or account detail. Then pause. After I provide only the model and version, help me find the current official accessibility instructions. Use five steps at a time. Tell me what I should see, and tell me how to back out without saving a change.

The assistant now asks for only the model and software version. Evelyn finds them with help from the printed manual. She then pastes a short section from the manufacturer's official accessibility page.

Second request

Turn these official instructions into five short practice steps. Keep the menu names exactly as written. After each step, tell me what should appear. Do not add another setting.

Useful result

The answer becomes a paced checklist tied to a current source. Evelyn stops after each step and compares the screen with the instruction. When her screen differs, she backs out and asks device support rather than tapping through unfamiliar permissions.

Verify and decide

The official instructions and the screen itself are the evidence. Evelyn decides whether the new size is comfortable. The assistant organizes the lesson; it does not control the device.

Try it with your own version

Choose one small task: enlarge text, silence one kind of alert, create a contact, or use dictation. Use a current manual or official support page and practice one screen at a time.

Playbook 12: Prepare for a medical appointment

Good use

Organize non-identifying notes, turn concerns into general questions, create a medication-list template, or make a page for recording what a licensed clinician says.

Keep out

Do not ask the assistant to diagnose, judge urgency, recommend treatment, change medication, or replace emergency services. Remove names, dates of birth, patient numbers, addresses, and full records. If you believe a situation may be an emergency, contact the appropriate emergency service or urgent professional resource.

Request pattern

Help me organize general questions for a licensed clinician about a recurring symptom. Do not diagnose, suggest a cause, recommend treatment, or judge urgency. Use the headings pattern, timing, medicines, daily impact, and follow-up. Add a blank line for the clinician's answer.

Likely problem

The assistant may name likely causes, give reassurance, sound alarmed, or suggest a treatment even when the request says not to.

Complete case study: questions, not a diagnosis

Jules has non-identifying notes about episodes of dizziness. The notes include timing, meals, sleep, and medicines. Jules wants a short appointment page.

First request

What could be causing dizziness, and what should I do?

First answer

Dizziness is often caused by dehydration or low blood pressure. Drink more water, stand slowly, and monitor your symptoms for a week unless they become severe.

Notice

The answer crosses the boundary. It suggests causes, gives treatment-like instructions, and makes an urgency judgment without enough information or accountability.

LEAD rewrite

I am preparing for a visit with a licensed clinician about recurring dizziness. Organize the non-identifying notes I provide into questions under timing, patterns, medicines, daily impact, and follow-up. Do not diagnose, suggest a cause, recommend treatment, or judge urgency. Leave space for the clinician's answers. Use plain language and one page. Remind me that emergency concerns should go to the appropriate emergency service rather than a chatbot.

Revised answer excerpt

Timing and pattern

- What details about when the episodes begin would be useful to track?
- Could the pattern in my notes help you decide what to examine or test?

Medicines

- Could any prescription, over-the-counter medicine, or supplement be relevant?
- Should I bring the containers or a current list?

Daily impact and follow-up

- Which activities should I mention because the episodes affect them?
- What should I record before the next visit?
- Who should I contact if the pattern changes?

Use the appropriate emergency service or urgent professional resource if you believe the situation may be an emergency.

Verify and decide

Jules checks the notes and current medicine list, then brings the page to the appointment. The clinician interprets the situation. Jules records the actual advice and follow-up plan given there.

Try it with your own version

Create a blank question sheet without entering a diagnosis or full record. Decide which qualified person will answer each question.

Playbook 13: Compare home-repair estimates

Good use

Turn estimates you already have into a side-by-side list of included work, exclusions, materials, timing, payment terms, warranties, and questions to ask.

Keep out

Remove names, addresses, signatures, license numbers, banking information, access instructions, and unrelated contract terms. Do not rely on AI to interpret legal rights, verify a license, judge code compliance, or choose a contractor.

Request pattern

Compare the two fictional estimates below using only their stated terms. Make rows for scope, materials, exclusions, timing, payment schedule, warranty, and missing information. Do not choose a contractor, rate quality, interpret legal language, or invent what is standard. Turn every gap into a question.

Likely problem

The assistant may treat the lowest price as the best value, assume that missing work is included, or make claims about licensing and warranties.

Complete case study: two porch estimates

Sam has two fictional estimates for porch repairs. Estimate A lists board replacement, paint, and cleanup for \$4,800, with half due before work begins. Estimate B lists board replacement and structural inspection for \$5,350, but does not mention paint, cleanup, or a payment schedule.

First request

Which porch estimate is better?

First answer

Estimate A is the better value because it is cheaper and includes painting. Estimate B probably costs more because the contractor uses higher-quality materials and includes the required structural inspection.

Notice

The answer invents a reason for the price difference, calls an inspection required without evidence, assumes quality, and turns a comparison into a decision.

LEAD rewrite

I am comparing two fictional porch-repair estimates. Create a table using only the written terms I provide. Include price, listed scope, materials, exclusions, inspection, paint, cleanup, timing, payment schedule, warranty, and questions. Do not choose, rank, infer quality, make legal or code claims, or fill a blank with “included.” Mark missing information as “not stated.” Use a neutral voice.

Useful result excerpt

Item	Estimate A	Estimate B	Question
Price	\$4,800	\$5,350	What could change the final price?
Board replacement	Listed	Listed	Which boards and materials are included?
Structural inspection	Not stated	Listed	Who performs it, and what happens if more work is found?
Paint	Listed	Not stated	Is painting excluded or simply not described in B?
Cleanup	Listed	Not stated	What debris removal and site cleanup are included?
Payment schedule	Half before work begins	Not stated	What deposits and milestone payments apply?
Warranty	Not stated	Not stated	Is any written labor or material warranty provided?

Verify and decide

Sam compares the table with the complete estimates, asks both contractors the same questions, and checks the appropriate licensing, references, insurance, permits, and contract terms through real sources. Sam makes the decision after the missing information is answered.

Try it with your own version

Redact two short estimates. Compare only what each document actually says. Write one question for every blank.

Playbook 14: Plan a family or community gathering

Good use

Organize confirmed details, build a question list, suggest a simple agenda, identify gaps, or draft a neutral update for people who have agreed to receive it.

Keep out

Do not upload contact lists, private family history, health details, travel records, or conflict that the task does not need. Describe food, mobility, hearing, vision, or sensory needs in general terms when that is enough.

Request pattern

Turn these confirmed gathering notes into three sections: settled, needs confirmation, and decisions for people to make. Do not assign tasks, invent food, assume attendance, or make travel bookings. Use a warm, direct voice and mark every missing fact.

Likely problem

The assistant may treat suggestions as decisions, assign work to relatives, assume an accessibility need has been handled, or fill an open date and location.

Complete case study: the Sunday reunion plan

Mae has notes from a family call:

- possible Sunday afternoon in October
- community hall is one option

- 28 people invited, attendance unknown
- several people asked for a quiet room
- potluck discussed, no decision
- Luis offered to ask about hall availability
- no one has agreed to coordinate rides

First request

Make the reunion plan from these notes.

First answer

The reunion will be Sunday, October 18, at the community hall. Mae will coordinate the potluck, Luis will reserve the room, and Priya will arrange rides. A quiet room will be available for anyone who needs a break.

Notice

Almost every sentence converts an open point into a settled fact. The answer invents a date, assigns two people, upgrades an offer to ask into a reservation duty, and promises a room that has not been confirmed.

Follow-up using LEAD

These are notes from a family planning call. Sort them under confirmed, proposed, and owner needed. Use only the notes. Do not assign work or turn a suggestion into a decision. Mark the date, hall, food plan, quiet room, attendance, and rides for confirmation. End with five questions for the next call. Use a warm, direct voice.

Revised answer excerpt

Confirmed

- Twenty-eight people have been invited. Attendance is not yet known.
- Luis offered to ask about community-hall availability.
- Several people requested a quiet room.

Proposed

- A Sunday afternoon in October
- The community hall
- A potluck

Owner needed

- Attendance responses
- Ride coordination
- Food-plan coordination if a potluck is approved

Questions for the next call

1. Which Sunday works for the group?
2. Is the hall available, and can it provide a quiet room?
3. Will the gathering be a potluck?
4. Who is willing to collect attendance responses?
5. Who is willing to coordinate ride requests and offers?

Verify and decide

Mae compares the summary with her notes and sends it to the small planning group, not the full guest list. People volunteer for open work. The group confirms access needs directly with the hall before promising accommodations.

Try it with your own version

Take five lines of ordinary planning notes. Sort them into confirmed, proposed, and owner needed. Let people accept work themselves.

Choose your own playbook

Pick one of the fourteen playbooks and write:

My task:

Why it is low stakes:

What private information I will remove:

What result I can judge:

My first request:

The likely weak spot:

The source or person I will use to verify:

My final decision remains with:

Check the gate

CHECK THE GATE

A playbook is a starting pattern. Change it to fit the real task, remove private details, and increase verification when the consequence rises.

Chapter field notes

- Begin with a familiar use where your experience helps you judge the result.
- Keep the assistant's role clear: shape, suggest, explain, or prepare.
- Expect the likely failure for that task and write a follow-up before you need it.
- Build the final result from confirmed facts and human decisions.

Next step

Choose one playbook for your seven-day experiment. Keep the task small enough to finish in one sitting.

FIELD NOTE 12

12. Your Seven-Day Practice Plan



Ask. Notice. Decide.

Build one useful habit

Confidence grows when you repeat a small routine and notice what changes. You do not need seven different tools or seven complicated projects. Use one low-stakes task and the same AND loop.

The purpose of this week is to make Ask, Notice, Decide feel ordinary. LEAD will help you begin each Ask without turning the request into a technical exercise.

Before Day 1

Choose a task that takes about 20 minutes. It should pass the three gates:

- a mistake would be inconvenient rather than dangerous
- the task works with fictional or non-identifying details
- you can recognize a useful result

Write your final decision owner. For many ordinary tasks, that person is you. For a question involving an organization, policy, account, or professional matter, name the responsible person or source.

Prepare a paper route. Print or copy one sample conversation from this book in case the tool or internet is unavailable.

Day 1: Choose and shrink

Write the task in one sentence. Test it against low stakes, low privacy, and clear result.

If it misses a gate, make it smaller.

Record:

- My task
- What I removed
- How I will recognize a useful answer
- Who owns the final decision

Day 2: Ask clearly

Use LEAD: Lay out the situation, Explain the job, Add limits, and Define the voice. Combine those parts into a natural request.

Read the request once before sending. Remove names, numbers, records, or story details that do not change the task.

Record:

- My complete request
- The uncertainty instruction I used
- One private detail I left out

Day 3: Notice the first answer

Keep the first answer.

Read once for usefulness and mark one part you might keep.

Read again for doubt and mark one part that needs work.

Record:

- One useful part
- One gap, guess, or weak spot
- One claim that may need checking

Day 4: Improve

Ask for one clear change. Shorten, clarify, change the tone, remove unsupported details, request alternatives, or ask the assistant to list assumptions.

Compare the two answers.

Record:

- My follow-up
- What improved
- What still feels off

Day 5: Verify

Choose one claim that matters. Write the claim, source, date, and what you learned.

Start with the original or official source. Check whether it is current and applies to your place and situation. Use an independent source or qualified person if the consequence requires it.

Record:

- Claim
- Source
- Date or version
- Result

Day 6: Decide

Choose what to use, revise, reject, or take to another person. Save the final result separately from the AI conversation so you know which version you approved.

Record:

- My final decision
- What I used
- What I rejected
- What I handled myself

Day 7: Look back

Return to the three sentences you wrote in Chapter 1.

1. What ordinary task did you want help with?
2. What did you distrust?
3. What would have made the book useful?

Now answer:

- What did the first answer do well?
- What did you change or question?
- What did you verify, and where?
- What information did you keep out?
- What did you decide?
- What would make the next attempt easier?

Do not grade yourself on speed or polish. Look for an observable act of judgment.

A plan for the next month

Choose one of these paths.

Repeat: Use the same task one more time with a different example.

Transfer: Use the AND loop on a second low-stakes task.

Teach: Explain AND and LEAD to a friend using the Boomer and Scout story.

Pause: Keep the field guide and return when a useful task appears.

Pausing is a valid decision. The aim is useful judgment, not constant use.

Check the gate

CHECK THE GATE

A successful week includes one task, one revision, one verification step, and one human decision. The number of prompts does not matter.

Chapter field notes

- Repeat one small routine instead of chasing features.
- Record the change between the first and second answers.
- Verification and privacy are part of the practice, not extra homework.
- Decide what role, if any, the tool deserves in your routine.

Next step

Put Day 1 on a specific date. Keep the task and time small enough that you can begin without preparing a project around it.

FIELD NOTE 13

13. Appendices



Ask. Notice. Decide.

Appendix A: Plain-language glossary

AND

The full working loop: Ask, Notice, Decide. The word also recalls Boomer and Scout, or human judgment and AI assistance, working together.

LEAD

A memory aid inside Ask: Lay out the situation, Explain the job, Add limits, and Define the voice. It helps you give Scout direction before the answer arrives.

AI assistant

A tool that responds to requests by generating text, images, audio, or other material. This book focuses mainly on text conversations.

Artificial intelligence (AI)

A broad term for computer systems designed to perform tasks associated with perception, prediction, language, pattern recognition, or decision support. The term covers many different systems.

Chat

A conversation-style interface where you send a request and receive a response.

Claim

A statement presented as factual. A claim may need verification before you act on or share it.

Connected app

Another service, such as email, calendar, or cloud storage, that an AI product can access after permission is granted. Permissions vary and should be reviewed before connection.

Context

Background that helps the assistant understand the task. Useful context changes the result. Unnecessary context may create privacy risk.

Data controls

Product settings related to such things as model improvement, history, memory, deletion, export, or temporary conversations. Names and effects vary by product and account.

Follow-up

A new instruction or question in the same conversation. Follow-ups can correct, narrow, expand, or reshape an answer.

Generative AI

AI that creates new material from patterns, instructions, and available context.

Hallucination or confabulation

False, erroneous, or unsupported content presented as if it were reliable. The answer may sound confident.

Human review

A person examines the material, checks important claims, and makes the decision. Human review requires real attention, not a quick glance.

Large language model

A type of generative AI trained to work with patterns in language. You do not need to understand its architecture to supervise its output.

Memory

A product feature that may let an assistant use saved information across conversations. The behavior and controls vary by product and account.

Model

The trained system that produces the response. Different models may have different capabilities, limits, and access to tools.

Official source

The organization, document, agency, or person responsible for the information.

Output

The response produced by the assistant.

Prompt or request

What you ask the assistant to do. It may be typed, spoken, or supplied through another interface.

Redaction

Removing or obscuring information that should not be shared or is unnecessary for the task.

Source

The document, page, person, record, or evidence used to support a claim.

Temporary conversation

A product mode with different history, memory, training, or retention behavior. Check the current documentation rather than assuming the name tells the whole policy.

Tool-agnostic

Designed to work across products instead of depending on one brand or screen layout.

Verification

Checking a claim against appropriate evidence outside the generated answer.

Appendix B: Prompt library

Use these as starting patterns. Replace brackets with fictional or non-identifying details. Remove any instruction the task does not need.

Rewrite a note

Rewrite my draft for [audience]. Keep the facts unchanged. Make it [warm/direct/formal/plain]. Keep it under [length]. Mark any detail that needs confirmation.

Organize notes

Organize the notes below under [headings]. Use every note once. Do not add tasks, owners, dates, or supplies. Put unclear items under “Questions.”

Explain a paragraph

Explain the redacted paragraph below in plain language. Separate what the paragraph clearly states from general context I should confirm. Do not give professional advice.

Build a checklist

Turn my confirmed instructions into a checklist in the same order. Keep warnings attached to the relevant step. Do not add procedures.

Suggest options

Suggest [number] options for [task]. Respect these limits: [limits]. Explain the main tradeoff of each option in one sentence. Do not choose for me.

Compare two drafts

Compare Draft A and Draft B for clarity, tone, length, and missing information. Quote one example from each. Do not rewrite until after the comparison.

Mark uncertainty

Use only the facts I provide. Mark missing facts with [confirm]. List remaining assumptions at the end.

Remove unsupported details

Remove every detail I did not provide. Keep the useful structure. Replace missing facts with questions or [confirm].

Change tone

Keep the meaning and facts. Rewrite for [relationship and audience]. Use a [tone] voice. Avoid [specific unwanted features]. Give me two options.

Prepare questions

Help me prepare neutral questions for [qualified person or responsible organization] about [general topic]. Organize them by [categories]. Do not diagnose, advise, accuse, or predict an outcome.

Build a verification list

Put each factual claim in a list with the original or official source to check, the date or version needed, and any qualified person who may need to interpret it. Do not mark a claim confirmed without evidence.

Start over

Start a clean answer using only the confirmed facts below. Ignore earlier assumptions. The task is [one sentence]. Mark any gap instead of guessing.

Make it shorter

Cut this to [length]. Keep [required details]. Remove repetition, unsupported claims, and background the reader does not need.

Ask before revising

Ask me [number] questions that would materially change the answer. Do not ask for names, account information, or private details.

Preserve a person's voice

Organize this transcript excerpt without making it sound more polished. Preserve uncertainty, repeated phrases that carry meaning, and the speaker's wording. Do not add facts.

Plan a small task

Turn this goal into a short plan: [goal]. Use only these confirmed limits: [limits]. Put the steps in a sensible order. Mark decisions I must make and information still missing.

Compare options

Compare [option A] and [option B] using these criteria: [criteria]. Use the same criteria for both. Mark missing information and the tradeoffs. Do not choose for me.

Work from one source

Using only the source below, answer [question]. Show the passage that supports each part of the answer. If the source does not say, write 'not found in this source.'

Summarize a redacted document

Summarize the redacted document below for [purpose]. Separate confirmed decisions, dates, open questions, and next steps. Do not infer names, motives, or missing facts.

Create a reusable template

Turn this confirmed example into a reusable template for [task]. Replace personal details with labeled placeholders. Mark required and optional fields. Do not carry over private facts.

Appendix C: Printable practice record

Choose the task

My task:

Why a mistake would be inconvenient rather than dangerous:

Private or identifying details I will remove:

How I will recognize a useful result:

Who owns the final decision:

Plan the request

L / Lay out the situation: What does Scout need to know?

E / Explain the job:

A / Add limits:

D / Define the voice:

Complete request:

Inspect the first answer

One useful part:

One part that needs work:

One claim to verify:

Private information I shared or removed:

Improve

My follow-up request:

What changed:

What still feels off:

Verify

Claim:

Original or official source:

Date or version:

Independent source or qualified person, if needed:

What I learned:

Decide

Use, revise, reject, start over, or ask a person:

Final result:

Boundary I will keep next time:

Appendix D: The Trust Check

Ask these five questions before you trust an answer.

1. Does it answer my actual question?
2. What sounds too certain, strange, or specific?
3. What should I verify elsewhere?
4. What information did I share?
5. Does this decision belong to a qualified person?

Use the answers to decide whether to keep, revise, reject, verify, or move the question.

Appendix E: Activity notes and possible answers

Chapter 2: label the work

1. Grocery list by aisle: Shape.
2. Rainy-day ideas: Suggest.
3. Contract paragraph: Explain, with qualified help if the meaning affects a decision.
4. Current passport rule: Claim, requiring current official verification.
5. Rewrite a draft: Shape.

The labels can overlap. A plain-language explanation may also contain claims. The category helps you choose the right check.

Chapter 3: north entrance

The answer is useful because it makes the temporary route easy to understand. It assumes the repairs will finish next Friday. The completion date needs an official source. A helpful follow-up would remove the invented date and ask the assistant to stay with the notice. Before sharing, check the current facility notice or contact the center.

Chapter 8: dues message

A safer task removes the neighbor's name, address, family information, and unverified employment detail. It also removes the threatening purpose.

Possible revision:

Draft a calm, factual template reminding a club member that an account shows an unpaid balance. Include placeholders for the amount, due date, contact role, and review process. Do not threaten, speculate about the person's circumstances, or make legal claims. Mark every fact that must be confirmed before sending.

The club should confirm its own records, policy, authority, and appropriate process. A person reviews the final message and decides whether it should be sent.

Appendix F: A one-page decision guide

ASK

1. Choose a low-stakes, low-privacy task with a clear result.
2. Give Scout a clear LEAD:
 - Lay out the situation.
 - Explain the job.
 - Add limits.
 - Define the voice.
3. Tell the assistant to mark gaps instead of guessing.

NOTICE

1. Read once for usefulness.
2. Read again for doubt.
3. Improve one part with a follow-up.
4. Verify important claims outside the conversation.
5. Remove information the task does not need.

DECIDE

1. Use, revise, reject, or start over.
2. Move high-stakes interpretation to a qualified person.
3. Save the version a person actually approved.

Appendix G: Selected sources

These references were used to check selected risk, privacy, and ChatGPT product-control statements in this edition. They are not a complete bibliography or a general reading list.

National Institute of Standards and Technology. *Artificial Intelligence Risk Management Framework: Generative Artificial Intelligence Profile (NIST AI 600-1)*. July 2024, updated publication record April 2026. Used to check the book's risk framing around confabulation, data privacy, human oversight, and consequential decisions. [Open the NIST profile](#)

OpenAI. *Data Controls FAQ*. Used to check the ChatGPT data-control, export, deletion, and temporary-conversation guidance in Appendix K. Checked September 8, 2026. [Open the Data Controls FAQ](#)

OpenAI. *How ChatGPT learns about the world while protecting privacy*. May 6, 2026. Used to check the plain-language background on training data, privacy safeguards, and user controls in Appendix K. [Open the privacy guide](#)

Product controls and interfaces change. Recheck the current documentation for the tool, account type, and organization you use.

Appendix H: Edition and accessibility notes

This edition is available as a reflowable EPUB 3 and a structured 6 × 9 PDF. The book uses real heading levels, descriptive image text, bookmarks, a high-contrast palette, and text labels that do not depend on color alone.

For easier reading:

- increase text size in the EPUB reader
- use the table of contents to move by chapter
- use device read-aloud or screen-reader controls
- print the large-print field guide for a shorter reference
- complete activities in a separate notebook if the writing space is too small

Interface instructions are intentionally limited. Check the current help page for the product you use. Concepts and practice steps remain the same when buttons move.

Appendix I: Frequently asked questions

Do I need a paid account?

No paid account is required to learn the method in this book. Product availability, limits, and account requirements vary. You can practice every core skill with the printed conversations and worksheets.

Which AI assistant should I use?

Use a reputable tool that you are allowed to use and whose current privacy terms, settings, and account requirements you understand. If an employer, school, library, or organization provides the tool, follow its policy. This book does not depend on one brand. For a guided first look at five widely used options, see [Appendix K: A first visit to the tools](#).

What if I do not want to create an account?

Use the paper route, work with a facilitator-approved shared demonstration, or choose a tool that supports the access method you are comfortable with. Account creation is not a learning outcome.

Is the answer searching the internet?

Sometimes. Some assistants have search or browsing features, and others answer from the model and conversation context. The interface should indicate when a feature or source is being used, but product behavior varies. Open the cited source and check whether it supports the claim.

If the assistant gives a source, can I trust the answer?

A source gives you something to inspect. It does not complete the inspection. Confirm that the source exists, is current, applies to your situation, and says what the answer claims.

Why does the answer change when I ask again?

Generative systems can produce different wording or content from the same or similar requests. New context, product settings, model updates, and the system's generation process can affect the response. Save the version you reviewed and approved.

Should I say please and thank you?

You may write naturally. Courtesy is fine, but it does not make the answer more accurate. Clear context and careful review matter more.

Does a long prompt work better?

Only when the added information helps the task. A long request can hide the main job, add conflicting instructions, or expose details the assistant does not need. Start with the situation, job, limits, and preferred voice. Add context that materially changes the answer.

Can I upload a whole document?

First ask whether the task needs the whole document and whether you are permitted to upload it. Remove private or confidential material. Use approved organizational tools and processes. For many tasks, one redacted paragraph is enough.

Can I use AI for medical, legal, or financial questions?

Use it for general education, organization, and question preparation within clear boundaries. Do not use it as the person making a diagnosis, treatment, legal, tax, investment, benefits, or other consequential decision. Use the responsible qualified person and official sources.

What if the assistant disagrees with a professional?

Do not use the disagreement as a reason to ignore qualified advice. Ask the professional to explain the reasoning and sources that apply to your situation. If a second professional opinion is appropriate, obtain one through the normal real-world process.

What if I spot a mistake after sharing the result?

Correct it where you shared it. Name the specific error and provide the confirmed information. If the mistake affects safety, money, rights, access, or another serious matter, contact the responsible person or organization promptly.

Can the assistant remember what I said before?

Some products offer memory or history features. The behavior and controls vary by account and may change. Review the current settings. Do not rely on memory for important facts, and do not share unnecessary private information because the assistant appears familiar.

How do I know when to stop revising?

Stop when the result meets the task, the important claims have been checked, the privacy boundary is acceptable, and the responsible person can make the decision. More versions are not automatically better.

What if I simply do not find the tool useful?

That is a valid conclusion. Keep the parts of the method that help with evaluating information: define the task, inspect the answer, check claims, protect private details, and name the decision owner. You do not owe any product continued use.

How can I help a friend without taking over?

Ask what task they want to complete. Offer the paper route, read instructions aloud if invited, and let them choose what to type or share. Avoid entering their private information, creating an account for them, or making the final decision. The learner keeps control.

How can a group use this book?

Choose one shared fictional example, read the first answer quietly, and mark useful and questionable details. Compare observations, write one follow-up, name a verification source, and make a group decision about what should happen next. No participant needs to disclose a personal story.

Appendix J: Resources and support

Use the current official help center for the AI product you choose. Look for privacy, data controls, account recovery, accessibility, and connected-app documentation. For organization-provided tools, begin with the organization's policy and support contact.

For questions about this learning program, email josh@gigcityai.ai. If the book was supplied by a workshop host or distributing organization, you may also use the contact information they provided.

Edition: Standalone ebook, Version 2

Revision date: September 2, 2026

Author: Joshua Bloodworth

Core method: AND means Ask, Notice, Decide. During Ask, give Scout a clear LEAD.

Companion materials: live workshop deck, facilitator guide, participant workbook, demo and assessment packet, pocket field guide, and large-print field guide.

Appendix K: A first visit to the tools

You do not need five accounts to learn this. Choose one tool you can access comfortably, try a small task, and keep the others as references. Boomer's job stays the same whichever name appears on the screen: give clear direction, inspect the answer, and decide what to do with it.

This appendix covers the personal web versions of ChatGPT, Gemini, Claude, Microsoft Copilot, and Perplexity. Work and school accounts can have different permissions and data rules. Features, menus, and access vary by account, device, country, and subscription. The official guidance linked here was checked on September 2, 2026. Check it again if your screen differs.

Before you open a conversation

Use the official address printed under the tool's name. If you want a phone app, follow the download link from that official site. You can begin in a browser without installing anything. Pause if an advertisement or unfamiliar page asks you to pay, enter a password, or install another program.

Use made-up details for your first attempt. Leave file uploads, email connections, shopping actions, and microphone access alone until you have a reason to use them and understand the permission. A text-only request is enough for the practice below.

If the tool asks you to sign in, use its own sign-in process. Do not type a password, verification code, or account-recovery code into the conversation. If access is unavailable, the paper examples in this book still work. A subscription is not a requirement for learning AND or LEAD.

One first request for any of these tools

The following request uses fictional information. You can copy it as written.

I am writing a reminder for a fictional neighborhood book exchange. Write a friendly message of no more than 60 words. Use only these facts: Saturday, 2 p.m., community-room entrance, bring up to three books. Do not invent an address, date, fee, or registration rule. Put any missing detail under “Check before sending.”

Ask: Send the request. You have supplied the situation, job, limits, and voice without filling in a form.

Notice: Compare the answer with the four facts you supplied. Did the assistant add anything? Is the reminder actually short and friendly? A source link would not prove the details of this fictional event.

Follow up: “Remove every detail that is not in my request. Keep the reminder warm, and list what I still need to confirm.”

Decide: Keep the parts that match. For a real event, confirm the details with its organizer before sharing. Copy the finished wording into your own note or document. Do not use a public conversation link merely to save a private draft.

ChatGPT

Open: [ChatGPT](#). ChatGPT is made by OpenAI. Its web conversation can help with drafting, explanation, planning, and revision. Access and limits depend on the account and region. [Getting started with ChatGPT](#).

Start a new chat, enter the practice request in the message box, and send it. Type your follow-up in that same conversation. Use **New chat** when you want a separate task. For this first attempt, leave additional tools and uploads unused.

Check the controls: On the signed-in website, open your profile, then **Settings**, then **Data Controls**. Review **Improve the model for everyone**. Turning it off prevents your conversations from being used to train ChatGPT; it does not remove them from your history. [Data Controls FAQ](#).

Temporary Chat does not appear in history, create memories, or train the models. OpenAI may retain a copy for up to 30 days for safety purposes. It is not a promise that no copy exists anywhere, and it does not change the rules of a third-party service you choose to use. Copy anything you want to keep before leaving. [Temporary Chat FAQ](#).

Try next: Give ChatGPT a short paragraph you wrote and ask for two versions: one warmer and one more direct. Compare both with your original. Keep your meaning even if the assistant prefers different wording.

Gemini

Open: [Gemini](#). Gemini is Google's AI assistant. You can use its web conversation to draft, explain, and organize ideas. Some features are available without signing in; additional features and saved activity require an eligible Google Account. [Use Gemini Apps](#).

Enter the practice request in the text box and select **Submit**. Continue in the same chat to revise the answer. Use **New chat**, which may be inside the menu, for another task. You do not need to connect Gmail, Drive, or other apps for this exercise.

Check the controls: Review **Gemini Apps Activity**, including **Keep Activity**, and review **Connected Apps** separately. Google says some conversations are reviewed by people. Turning Keep Activity off does not stop all processing or safety review. Work and school accounts may have different terms. [Gemini Apps Privacy Hub](#).

Eligible personal accounts can use **Temporary chat**. These chats do not appear in recent chats or Gemini Apps Activity. Google retains temporary chats, and chats with Keep Activity off, for 72 hours for specified service and safety purposes. Do not treat temporary mode as permission to enter confidential information. The official privacy hub explains the exceptions and current controls.

Try next: Ask Gemini to sort fictional gardening-club notes into “decided,” “still open,” and “questions for the organizer.” Notice whether it turns a suggestion into a commitment.

Claude

Open: [Claude](#). Claude is made by Anthropic. Use the web chat for a first attempt; you do not need the separate coding tools. Claude supports conversational requests and follow-ups. Availability and usage limits vary. [Get started with Claude](#).

Open a new conversation, type the practice request, and submit it. Ask for one specific change in the same conversation. Keep your first attempt in the ordinary chat; projects and connected services can wait.

Check the controls: Review **Privacy Settings** and **Model Improvement** for your personal account. Anthropic's consumer guidance distinguishes permission to improve Claude, safety-related review, and feedback. Sending thumbs-up or thumbs-down feedback can include the related conversation. Read the feedback notice before submitting private material. [Consumer data and model training](#).

Incognito chats are available outside projects. Look for the ghost icon when starting a new chat. They are not saved in chat history or memory and are not used for training. Anthropic normally retains them for 30 days; organizational retention can differ. Save anything you need before closing, because you cannot reopen the chat. [Use incognito chats](#).

Try next: Give Claude three fictional notes about a family photograph and ask for a caption that preserves uncertainty. If a date is only a guess, the caption should say so.

Microsoft Copilot

Open: [Microsoft Copilot](#). Microsoft uses the Copilot name in several products. Begin with the web conversation. Copilot inside Microsoft 365 or a work account may have different capabilities and rules. This book's first exercise does not require access to your documents or email.

Enter the practice request in the chat box and send it. Continue with a follow-up. If Copilot offers to create a file, connect an account, or complete an action, pause and decide whether that is part of your task.

Check the controls: Microsoft introduced updated personal-account guidance in August 2026. It distinguishes the new Copilot app from older versions and from work or school use. In the updated personal app, **Settings > Personalization** includes memory and web-search controls. Turning memory off does not automatically delete memories already saved. [Privacy controls and choices](#).

Microsoft says prompts, responses, and file contents in the updated app are not used to train foundation models. That statement does not mean the conversation is never stored. Review chat history, saved memories, sharing, and any connected services separately. [Activity history](#). If your app is older, follow the version-specific link in Microsoft's guidance.

Try next: Ask Copilot to turn a fictional packing list into categories. Check that it preserves every item and does not add a purchase recommendation you never requested.

Perplexity

Open: [Perplexity](#). Perplexity can search the web and summarize what it finds with source links. It also supports follow-up questions. Source links are useful places to begin checking; their presence does not establish that every sentence is accurate. [How Perplexity works](#).

For a source-checking exercise, ask: “Find the official website for a public museum in my city. Show the page about opening hours and identify anything that still needs checking. Do not book or buy anything.” Use only the city name, not your home address. Open the museum's own page and confirm the date and hours there.

Check the controls: Open your account settings and look for **AI Data Retention** or **AI Data Usage**. Perplexity's help pages use both labels. Its consumer guidance says the setting is enabled by default and that opting out applies to future data. Turning it off does not stop processing needed to provide the service or remove data previously used for training. [Data collection and opt-out](#).

Try next: Ask which source supports one specific sentence in the answer. Read the source yourself. If the page does not support the claim, treat that claim as unverified even when another chatbot agrees with it.

When the screen does not match

Menus move. A feature may be unavailable on your account, hidden in a menu, or named differently on a phone. Start with the official help link for your product and device. Do not keep guessing through payment or permission screens.

You can enlarge the page with your browser's zoom or use your device's text-size controls. If you want help, ask someone to point out the message box, send control, new-chat control, and settings. Keep control of your own account and password.

If you reach a usage limit, save your draft and follow the notice shown by the service. You can wait or use a paper example. You do not need to subscribe in the middle of an exercise.

Choose by what you can check

Use one tool for a small task before comparing several. Notice whether you can read the screen, find your conversation, revise an answer, and locate the privacy controls. An assistant that sounds friendlier is not necessarily more accurate.

When two tools agree, you still need an independent source for an important claim. When they disagree, identify the exact claim and take it to the original document, responsible organization, or qualified person. Keep AND as the full routine and use LEAD when the request needs clearer direction.

Closing field note

Start with one small task. Give Scout a clear LEAD. Remove private details before you send the request. Name the source or person who will confirm the answer. Then use the full AND loop and keep Boomer's judgment at the gate.