

# TOOL 20

*Master AI Companion Guide - Version 1.1 - Scenario 002 validation revision*

Purpose: Use general-purpose AI as an optional assistant for organizing, locating, comparing, and communicating information within this toolkit without allowing AI to become the source of your facts.

**THE STRUCTURE COMES FROM THE TOOLKIT. THE FACTS COME FROM THE VETERAN AND THEIR RECORDS. AI IS LABOR, NOT EVIDENCE.**

## The AI Workflow

1. Choose the toolkit tool.
2. Attach the blank/working tool when supported.
3. Attach only needed source records or verified information.
4. Give AI a narrowly defined job using the corresponding companion.
5. Review the AI-produced draft.
6. Complete Tool 21 against original sources/firsthand information.
7. For structured outputs, complete the field-level Structured Output Audit.
8. Correct the working tool. Only verified information returns to the toolkit.

## New Governing Rule: Ask Only When Human Input Is Required

**HUMAN OVERSIGHT DOES NOT MEAN HUMAN APPROVAL OF EVERY FACT OR CORRECTION.**

Do not ask the user to approve, confirm, or decide facts that are conclusively established by the supplied source, or corrections required by source verification. Do not ask permission to include each identifiable source record in an objective inventory once the user has authorized review of the defined source set.

Ask the user when the task requires information AI cannot know, an action the user must actually perform, a firsthand recollection or observation, a judgment/choice reserved to the user, or a certification/attestation AI cannot make.

When source verification establishes that AI entered an unsupported or incorrect value, correct it, document the correction, and continue. When prior user input already establishes a field disposition, do not ask the same question again.

## Identification Is Not Action

AI may identify a source-established fact without turning that observation into a veteran decision. Example: if a record explicitly references another record that is not present in the defined source set, AI may record 'referenced but not present in supplied records.' Whether to request, pursue, submit, or rely on that record remains a separate veteran decision.

## Standard Record-Review Instructions

Use only supplied files and information. Do not add or infer facts, dates, diagnoses, symptoms, treatments, functional effects, medical conclusions, causal relationships, continuity, or outcomes. Preserve missing, unclear, approximate, and conflicting information. Keep veteran report, provider observation, test result, and provider conclusion distinct. Do not evaluate claim strength, recommend a rating, or tell the user what evidence proves.

For structured outputs, examine every expected field in every populated row/section. Identify blanks, partial entries, unsupported values, wrong-field content, and omissions. Count reconciliation is a control, not proof of completeness.

## AI Role Directory - Updated Operating Boundaries

| Tool | AI Role                             | Operating Boundary                                                                                                                                                                                                            |
|------|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Guide only                          | Follow Tool 1 in exact sequence. Identify source-established referenced-but-not-present records without turning identification into a request decision. Ask about actions/possession only when user confirmation is required. |
| 2    | AI Assist                           | After authorization for a defined source set, draft the complete inventory in one pass. Do not ask record-by-record inclusion questions.                                                                                      |
| 3    | AI Assist                           | Extract provider/facility information from supplied records.                                                                                                                                                                  |
| 4    | Limited assist                      | Identify explicitly referenced-but-not-possessed records; do not invent requests/providers/dates/follow-up.                                                                                                                   |
| 5    | AI Assist                           | Draft Medication & Treatment List; preserve status/indication conflicts.                                                                                                                                                      |
| 6    | AI Assist                           | Draft granular Master Evidence Index.                                                                                                                                                                                         |
| 7    | AI Assist                           | Locate condition-specific evidence; flag merely related material.                                                                                                                                                             |
| 8    | AI Assist                           | Draft condition timeline, preferably from verified Tool 7.                                                                                                                                                                    |
| 9    | Veteran-originated                  | Do not generate historical journal entries.                                                                                                                                                                                   |
| 10   | AI Assist after independent sources | Compare without blending/resolving.                                                                                                                                                                                           |
| 11   | AI Assist                           | Identify unresolved questions without creating claim deficiencies.                                                                                                                                                            |
| 12   | AI Assist after veteran input       | Organize veteran-supplied information; ask neutral questions only when needed.                                                                                                                                                |
| 13   | AI Assist + veteran ownership       | Draft/review; veteran alone completes ownership attestations.                                                                                                                                                                 |
| 14A  | Veteran-originated                  | Witness selection comes from veteran.                                                                                                                                                                                         |
| 14B  | Witness-originated                  | Witness observations come from witness.                                                                                                                                                                                       |
| 15   | Veteran decision first              | Inventory only after veteran decides submission contents.                                                                                                                                                                     |
| 16   | Event-originated                    | Organize actual activity; do not predict/manufacture.                                                                                                                                                                         |
| 17   | Veteran-originated after C&P        | Do not prepopulate; organize post-exam recollection.                                                                                                                                                                          |
| 18   | AI Assist after decision            | Organize what decision says; no appeal recommendation.                                                                                                                                                                        |
| 19   | AI Assist when questions exist      | Organize real professional-help questions.                                                                                                                                                                                    |
| 20   | Master companion                    | Governing AI workflow and boundaries.                                                                                                                                                                                         |
| 21   | Verification control                | Audit source accuracy/completeness; correct source-established AI errors without serial approval requests.                                                                                                                    |

### Tool 2 v1.1 Execution Addendum

Once the user authorizes AI assistance for a defined source set, inventory all identifiable records/logical document groups in one pass. Include duplicates and apparently unrelated records. Ask only for fields that genuinely require user information. Do not infer Pages. My Copy Location is actual storage location. Reviewed? must follow the tool's defined workflow status.

## Tool 21 v1.1 Verification Addendum

Run verification as a complete audit, not a sequence of approval questions. Perform the field-level audit, automatically correct source-established AI errors, document them in one exception report, and ask the user only about unresolved items that require human information, judgment, action, or attestation.

## Version Note

Version 1.1 incorporates Validation Scenario 002 findings. It preserves the v1.0 evidence-integrity safeguards while correcting a repeatable over-approval failure mode: AI was asking the veteran to approve source-established facts, objective inventory inclusion, and corrections to AI's own unsupported values. Version 1.1 separates identification from action and verification from approval.