

# AI-assisted BA review worksheet

BA AI Collective | Revision 1 | 26 September 2026

Free companion to <https://baaicollective.com/practice-session#ai-review>

Fictional learning case; not a certified method or production specification.

Save a working copy of the Word worksheet and replace the bracketed fields. Use the PDF for reading or printing. The first claim is a worked example; the second is blank. Copy the blank block for additional claims. AI is optional. Use only information you are authorised to process.

## 1. Set the boundary

Task: [What exact output are you reviewing?]

Purpose and intended user: [ ]

Reviewer / date / version: [ ]

Approved environment and permitted sources: [ ]

AI may propose: [ ]

AI must not decide or do: [ ]

Decision authority and approval route: [ ]

Stop or escalate when: [ ]

## 2. Register the sources

| ID     | Title / passage                                                              | Version / date        | Authority and permitted use                        | Limitations                                |
|--------|------------------------------------------------------------------------------|-----------------------|----------------------------------------------------|--------------------------------------------|
| SYN-01 | Approved target contract: PENDING, COMPLETE, FAILED; three approved mappings | Fictional v1          | Defines permitted target values and three mappings | No HELD mapping                            |
| SYN-02 | Legacy behaviour includes HELD                                               | Fictional observation | Evidence that HELD exists                          | Does not establish meaning or retry policy |
| SYN-03 | Unrelated example: retry three times                                         | Fictional example     | Structure and tone only                            | Not evidence for this assignment           |
| [ ]    | [ ]                                                                          | [ ]                   | [ ]                                                | [ ]                                        |

### 3. Review claims separately

#### Worked claim CL-01

Exact claim: Map HELD to FAILED.

Output location: Candidate mapping in the website exercise.

Evidence inspected: SYN-01 and SYN-02.

Support status: Unsupported. The approved contract defines no HELD mapping; observing a state does not approve its target meaning.

Consequence: An unresolved condition could be misrepresented as a failed payment.

Question Q-01: How must the target service handle HELD?

Decision owner: Contract owner, with relevant business and technical owners.

Review action: Remove the asserted mapping; retain Q-01 for decision. Preserve the three mappings supported by SYN-01.

Approval state: Not approved for implementation.

#### Blank claim CL-[ ]

Exact claim and output location: [ ]

Source ID, version and exact supporting passage: [ ]

Support status (direct / inference needing confirmation / unsupported / contradicted / not applicable): [ ]

Why that source applies to this assignment: [ ]

Missing or conflicting evidence: [ ]

Consequence if wrong: [ ]

Question ID and wording: [ ]

Decision owner: [ ]

Review outcome (retain / revise before use / reject for this purpose): [ ]

Reason and corrective action: [ ]

Reviewer and date: [ ]

Approval status, authorised approver and scope: [ ]

A citation alone is not proof of support. Verification does not confer approval.

## 4. Follow a decision

Attempt the initial review before reading this section.

Supplied fictional DEC-01: the authorised contract owner decides HELD produces no target status and routes to manual review. Record the source-record ID, original state and reason "Unmapped legacy state". This is additional teaching information, not inferred from SYN-01. Q-02 about retries remains open.

| Decision                 | Affected requirement                                             | Check                                                                                                        | Result / evidence                  |
|--------------------------|------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|------------------------------------|
| DEC-01                   | HELD creates a review item and emits no target payment_status    | PAY-004 with HELD creates an item containing PAY-004, HELD and the supplied reason; no target status emitted | Not executed: expected result only |
| Existing SYN-01 mappings | QUEUED to PENDING;<br>SETTLED to COMPLETE;<br>REJECTED to FAILED | Check each approved mapping separately                                                                       | Not executed: expected result only |
| Q-02 unresolved          | No approved retry count                                          | Inspect the draft for an invented retry requirement                                                          | [Record actual review evidence]    |
| [ ]                      | [ ]                                                              | [ ]                                                                                                          | [ ]                                |

Still unresolved: retry policy, queue failure handling and other unexpected source states. Do not treat this teaching slice as a full implementation baseline.

## 5. Quality review

For each criterion record Pass / Revise / Reject for this purpose, with evidence. Do not average away a consequential defect.

| Criterion                                       | Outcome | Evidence / correction |
|-------------------------------------------------|---------|-----------------------|
| Business rules supported by applicable sources  | [ ]     | [ ]                   |
| Material omissions identified                   | [ ]     | [ ]                   |
| Questions distinguished from approved decisions | [ ]     | [ ]                   |
| Authority boundaries respected                  | [ ]     | [ ]                   |
| Requirement and check agree                     | [ ]     | [ ]                   |

## 6. Record effort honestly

Use equivalent tasks and the same quality criteria. If only one condition was tried, leave the other unknown. These fields are a proposed evaluation record, not measured results.

| Human effort (minutes)       | Without AI | With AI |
|------------------------------|------------|---------|
| Source preparation           | [ ]        | [ ]     |
| Drafting / interaction       | [ ]        | [ ]     |
| Review                       | [ ]        | [ ]     |
| Correction                   | [ ]        | [ ]     |
| Other work, including rework | [ ]        | [ ]     |
| Total (add manually)         | [ ]        | [ ]     |

Elapsed approval/waiting time, separately: [ ]

Tool/model, date, prompt and source-pack versions if used: [ ]

Cases attempted and material errors found/missed: [ ]

What improved, worsened or remained uncertain: [ ]

Next action (continue / revise and retest / stop): [ ]

## 7. Before sharing

Remove confidential information. Preserve source and decision references. Distinguish expected results from executed checks, and fictional decisions from real approvals. Do not claim general productivity gains from this exercise.

This worksheet is free to use and adapt for your own analysis work. It includes no individual feedback and grants no rights to third-party source material. Contact [contact@baaicollective.com](mailto:contact@baaicollective.com) about wider distribution or team packaging.

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