



AI Tools Intake Form

For employees requesting approval to use an AI tool, feature, plug-in, or agent within the organization.

Purpose

Collect the key information needed to evaluate AI tool requests quickly and consistently.

When to use

Before starting a trial, enabling an AI feature in an existing vendor platform, or sharing company data with a new AI service.

Tip

Please do not paste sensitive or confidential information into this form. Describe data types at a high level.

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01. Requestor and Business Owner

Requestor Name		Department / Team	
Email		Manager	
Business Owner (accountable owner for this use case)		Date Submitted	

02. Tool Overview

Tool Name		Vendor/Provider	
Website/ Product Link		Requested Start Date (or Pilot Dates)	
Estimated Cost (Monthly/Annual)		Budget Owner	

Tool type (check all that apply)

- ☐ Standalone GenAI chatbot or assistant
- ☐ AI feature inside an existing vendor platform (e.g., CRM, collaboration, productivity)
- ☐ Meeting transcription / summarization tool
- ☐ Code assistant / developer tool
- ☐ Marketing / creative generation tool
- ☐ Analytics / forecasting / decision-support tool
- ☐ Agentic tool that can take actions (e.g., update systems, send messages, trigger workflows)
- ☐ Other: _____

Deployment model (check one)

- ☐ SaaS / cloud
- ☐ On-premise
- ☐ API / embedded in our product
- ☐ Browser extension / plug-in
- ☐ Open-source / self-hosted
- ☐ Other: _____

03. Business Purpose and Intended Use

In 2-3 sentences, what problem are you trying to solve and what will success look like?

Primary workflow(s) (check all that apply)

- ☐ Drafting or editing internal documents
- ☐ Summarizing documents or meetings
- ☐ Research / knowledge retrieval
- ☐ Customer support or external communications
- ☐ Sales enablement / proposals / RFP support
- ☐ Software development or IT operations
- ☐ HR / people operations
- ☐ Legal / compliance support
- ☐ Content publishing or marketing distribution
- ☐ Other: _____

Will any outputs be customer-facing or published externally?

- ☐ No
- ☐ Yes (Describe):

Will the tool be used to make or support decisions about individuals (e.g., hiring, performance, eligibility, credit, housing, or similar)?

- ☐ No
- ☐ Yes (Describe):

04. Data Types and Inputs

What types of data will be entered, uploaded, or connected to the tool?
(check all that apply)

- ☐ Public information
- ☐ Internal business information (non-confidential)
- ☐ Confidential business information
- ☐ Customer data / Personal data (PII)
- ☐ Employee / applicant data
- ☐ Health information (PHI) or HIPAA-regulated data
- ☐ Financial account data
- ☐ Payment card data (PCI)
- ☐ Student / education data
- ☐ Data relating to minors
- ☐ Source code
- ☐ Trade secrets
- ☐ Other: _____

Will the vendor/tool retain prompts, uploads, or outputs?

- ☐ No
- ☐ Yes
- ☐ Unknown

Does the vendor/tool use customer inputs to train models by default?

- ☐ No/Opted Out
- ☐ Yes
- ☐ Unknown

If opt-out is available, who will confirm opt-out and where is it documented?

Describe the data at a high level (no sensitive details):

05. Integrations, Access, and Actions

Integrations requested (check all that apply)

- ☐ SSO (Okta/Azure AD/Google)
- ☐ Slack / Microsoft Teams
- ☐ Google Drive / Microsoft 365 / SharePoint
- ☐ Jira / Confluence
- ☐ GitHub / GitLab
- ☐ Salesforce / CRM
- ☐ Data warehouse / BI tools
- ☐ Other: _____

Permissions needed (check one)

- ☐ Read-only
- ☐ Read/write
- ☐ Admin / elevated access
- ☐ Not sure

Can the tool take actions automatically

(e.g., send messages, update records, trigger workflows, execute code)?

- ☐ No
- ☐ Not sure
- ☐ Yes (Describe the actions and any human approval step):

06. Security and IT Review (attach/link where available)

Security documentation available

(check all that apply)

- ☐ SOC 2 Type II report
- ☐ ISO 27001 certification
- ☐ Pen test summary
- ☐ Security whitepaper
- ☐ Subprocessor list
- ☐ Data Processing Addendum (DPA) / privacy addendum
- ☐ Incident response / breach notification policy
- ☐ Other: _____

Known data hosting location(s)

(if applicable)

Single sign-on / MFA supported?

- ☐ Yes
- ☐ No
- ☐ Unknown

Security/IT reviewer (name) and date

07. Privacy, Legal, and Compliance Considerations (high level)

Will a contract or new vendor terms be required?

- ☐ No
- ☐ Yes
- ☐ Unknown

Will a DPA/privacy review be required based on data types above?

- ☐ No
- ☐ Yes
- ☐ Unknown

Will the tool be used in a regulated context?
(check all that apply)

- ☐ Healthcare / HIPAA
- ☐ Financial services / GLBA
- ☐ Education / FERPA
- ☐ Children / COPPA
- ☐ Government contracting / export controls
- ☐ Other: _____
- ☐ None / not sure

Any known legal/compliance concerns or requirements:

08. User Guidance and Training Plan

Who will use the tool and approximately how many users?

What guidance will users receive about what they may (and may not) input?

Who will review outputs for accuracy, confidentiality, and appropriateness (if needed)?

09. Approvals and Decision

Function	Reviewer	Status	Date
Business owner		☐ Approved ☐ Approved w/ conditions ☐ Needs info ☐ Not approved	
Manager		☐ Approved ☐ Approved w/ conditions ☐ Needs info ☐ Not approved	
IT / Security		☐ Approved ☐ Approved w/ conditions ☐ Needs info ☐ Not approved	
Privacy		☐ Approved ☐ Approved w/ conditions ☐ Needs info ☐ Not approved	
Legal / Compliance		☐ Approved ☐ Approved w/ conditions ☐ Needs info ☐ Not approved	

Conditions / Notes (if approved with conditions)

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