

Weekly and Monthly Review Routine

A printable checklist and tracking log for any agent that does real work

Agents drift. Documents change, connected services alter their format, and vendors update the model underneath you. This routine catches problems early. Print one copy per agent.

Weekly • about 20 minutes

- ☐ Read ten randomly chosen runs, including at least two that were corrected or escalated
- ☐ Log every problem with its cause: model, instructions, tool or context
- ☐ Check that approvals are not being rubber-stamped
- ☐ Note any new kind of request the agent did not expect

Monthly • 30 to 60 minutes

- ☐ Re-run the full evaluation and compare with last month
- ☐ Add any new failures to the test set
- ☐ Review the feedback log for patterns
- ☐ Tidy the instructions and the notes file
- ☐ Review tool permissions and remove any not used
- ☐ Decide whether autonomy should move up, stay or move down

After any change

- ☐ Re-run the whole evaluation, including after the underlying model or a connected tool is updated
- ☐ Compare each group with the previous version and accept the change only if nothing important got worse
- ☐ Safety rules stay at 100 percent without exception

Quarterly • about one hour

- ☐ Review instructions, tools, permissions and memory for clutter or risk

- ☐ Confirm the named owner, the stop button and the incident plan are still current

Four numbers to track

Keep them simple. Rising corrections are an early warning. Falling corrections over several months are the evidence you need to raise autonomy.

Week of	Runs read	Corrected or rejected	Escalated to a person	Incidents	Time saved (est.)

Agent name: _____ Owner: _____ Instructions version: _____



More free worksheets, spreadsheets and templates for *Agents You Can Understand* at **cogitentpress.com/agents**
© 2026 Cogitent Inc. Published by Cogitent Press. Free to use and share with this notice intact. Provided for general education; it is not legal or professional advice.