When Capability Gets a Body

Companion Toolkit

Book 5 of Rentable Expertise by Alex Tran

Make the person, the actual need, the limits of authority, and the continuity of care visible before relying on an embodied capability.

For readers, families, caregivers, and business leaders considering embodied AI, companionship, memory, and delegated care.

How to use this toolkit

Choose one real decision and one relevant worksheet. Print the PDF or type into the Word version. Keep your working copy private and use fictional or redacted information when asking others for feedback. No book purchase or paid membership is required.

These exercises adapt the book into working records. They are not a reproduction of every chapter or a test with a total score. Chapter references identify the basis; the worked example is fictional. Use Sources and Notes to review the chapter map and further reading.

Choose a worksheet

01 Does the body earn its place
02 Compare the actual care arrangement
03 Keep memory claims honest
04 Map permission for a personal history
05 Preserve provenance and disagreement
06 Test continuity beyond export
07 Agree the role and authority
08 Protect human contact and autonomy
09 Review before delegating care

Write unknown when evidence is missing. Finish with a decision, a named owner, and a review point. A completed worksheet does not itself grant permission to act.

WORKSHEET 01 | Chapters 1 to 3

Does the body earn its place

Decide which part of the need requires physical action or presence.

An attractive body or a polished demonstration does not establish competence in the intended home, role, or task.

1. Person and desired outcome in their own terms

2. What must happen physically, and what can be done through a screen?

3. Actual human, digital, and physical alternatives available

4. Capability stack behind the body and evidence for this particular job

5. Full cost and burden: setup, supervision, maintenance, and failure

6. Decision: physical body adds value, simpler option fits, or evidence is insufficient

Decision owner _____ Review date or trigger _____

WORKSHEET 02 | Chapters 4 to 6 and 21

Compare the actual care arrangement

Compare realistic arrangements around the person receiving care.

Compare with accessible alternatives, not an ideal caregiver. A person may welcome help with one task and refuse it for another.

1. Whose need is this, and who buys, uses, and receives the service?

2. Specific task or form of companionship being considered

3. Available alternatives and their actual strengths, limits, and costs

4. What the person values: privacy, independence, presence, dignity, or practical help

5. Other people and services the arrangement still depends on

6. Choice, unresolved constraint, and person who will revisit the arrangement

Decision owner _____ Review date or trigger _____

WORKSHEET 03 | Chapters 7 to 9 and 13

Keep memory claims honest

Distinguish a designed identity, stored information, and experience that actually occurred.

Stored memories are not automatically a lived past. Preserve the distinction between a designed backstory, testimony, and recorded interaction.

1. Claim about the companion's identity, past, or relationship

2. Was it designed, told by someone, inferred, or directly recorded?

3. Source, date, context, and uncertainty attached to the claim

4. How the system explains the difference to the person using it

5. Correction process when a memory is mistaken, disputed, or out of date

6. Boundary on claims the system should not make

Decision owner _____ Review date or trigger _____

WORKSHEET 04 | Chapters 10 to 12

Map permission for a personal history

Identify whose life and information are represented before capture, access, or reuse.

A person's account may contain someone else's private information. Permission for one use is not blanket permission for every future use.

1. Purpose and minimum personal material needed

2. People represented, including others mentioned in the story

3. Permission to collect, use, share, or reuse; what remains unresolved?

4. Who can view or correct the information and under what conditions?

5. Retention, withdrawal, deletion, and any limits that must be explained

6. Material to exclude until permission and responsibilities are clear

Decision owner _____ Review date or trigger _____

WORKSHEET 05 | Chapters 13 and 14

Preserve provenance and disagreement

Keep a meaningful history without converting every story into an unquestioned fact.

Preserve provenance and uncertainty. An intimate or familiar account still needs an honest description of where it came from.

1. Event or story being preserved and why it matters

2. Source: direct record, personal account, interpretation, or reconstruction

3. What is known, uncertain, disputed, or missing?

4. Relevant people and their ability to correct or add context

5. What can be shared, with whom, and for which purpose?

6. How later corrections remain visible without erasing the history

Decision owner _____ Review date or trigger _____

WORKSHEET 06 | Chapters 15 to 18

Test continuity beyond export

Define what continuity means before replacing a body, provider, or system.

Files moving successfully does not prove that behavior or a relationship continues. Physical wear, provenance, and narrative meaning are different things.

1. What should continue: records, preferences, corrections, behavior, or relationship meaning?

2. What can actually be exported and understood elsewhere?

3. Rights, formats, model behavior, or dependencies that may not transfer

4. Which wear, history, and meaning belong to this particular body?

5. Small safe transfer test and who judges whether continuity is acceptable

6. Fallback if the provider disappears or the replacement is not equivalent

Decision owner _____ Review date or trigger _____

WORKSHEET 07 | Chapters 19 and 20

Agree the role and authority

Separate a welcome role from permission to act, especially when instructions conflict.

The authority ladder is a thinking aid, not a clinical or legal protocol. Role, access, authority, autonomy, and oversight remain separate decisions.

1. Role the person welcomes and actions they do not want

2. Allowed level for each action: observe, recommend, prepare, confirmed action, or bounded standing authority

3. Who can grant, change, refuse, or revoke that authority?

4. Which instruction controls when the recipient, family, and provider disagree?

5. Exception that must go to a human; fallback if that person is unavailable

6. Evidence, stop control, and planned review with the person receiving care

Decision owner _____ Review date or trigger _____

WORKSHEET 08 | Chapters 19 to 22

Protect human contact and autonomy

Check whether the arrangement expands the person's choices and supports the relationships they value.

The purchaser's convenience is not the only outcome. Ask the person receiving care about practical autonomy, dignity, and human presence.

1. What the person wants more freedom to do

2. Human contact or family responsibilities they want to preserve

3. How machine assistance might connect, support, or displace those relationships

4. Who bears the supervision, financial, and practical burden?

5. How the person can refuse, modify, or leave the arrangement

6. Observation that would show the arrangement is helping or should change

Decision owner _____ Review date or trigger _____

WORKSHEET 09 | Chapters 20 to 22

Review before delegating care

Bring the decision together for one specific task and one particular life.

Use this as a discussion record. It does not certify a device, authorize care, or replace the qualified assessment required for a consequential care decision.

1. Task, person's preference, and actual alternative

2. Evidence that the capability is suitable and limits that remain

3. Authority, human review, and actions that stay prohibited

4. Who notices failure, who responds, and what safe fallback exists?

5. How refusal, changed preferences, or lost access alter the arrangement

6. Decision: proceed within agreed bounds, gather evidence, modify, or decline; next review

Decision owner _____ Review date or trigger _____

Worked example

A reminder without family surveillance

Fictional example: Mara wants help remembering a weekly social call. Her family is considering a household companion that can display reminders.

Need and alternative

The desired outcome is remembering the call. Compare an ordinary calendar reminder before assuming a moving robot is needed.

Preference

Mara wants a reminder she can dismiss. She does not want her family notified every time she ignores one.

Authority

The system may display the agreed reminder. It may not call anyone, share routine information, or change the calendar without her confirmation.

Memory and exit

Store only the reminder and chosen preference. Explain who can see them and how Mara can remove them or move to another tool.

Review

Ask Mara whether the reminder was useful after two weeks. Keep, change, or stop it based on her experience. No clinical outcome is claimed.

Use the example to understand the method. Choose evidence, limits, and review points that fit your own situation.

Book page and reading formats