AI PDF Summary Worksheet

Define the job, use a focused prompt, and verify the details that matter

What I need from this document

- [ ] I need to understand this document so I can: _____
- [ ] The decision, meeting, reply, or study task this supports: _____
- [ ] Maximum useful length of the summary: _____

Before upload

- [ ] I checked whether the file is public, mine to use, and permitted for this account.
- [ ] I removed private or unrelated details and kept only the pages the task needs.
- [ ] I tested whether the PDF has selectable text; if not, I used OCR or a text-copy fallback.

Copy this prompt

> Read this PDF and use only the document as your source. Give me: (1) the main request or conclusion in two sentences; (2) decisions I need to make; (3) important dates, deadlines, and numbers; (4) action items and owners; and (5) three facts I should verify, with PDF page numbers. Use plain English. If a detail is missing or unreadable, say so instead of guessing.

AI PDF Summary Worksheet - continued

Verification log

- [ ] Important number or amount: _____ PDF page: _____ Checked: [ ]
- [ ] Important date or deadline: _____ PDF page: _____ Checked: [ ]
- [ ] Condition using if, unless, only after, or subject to: _____
- [ ] Page the AI could not read or cite: _____

Useful result

- [ ] The one action I will take next: _____
- [ ] The person who needs the summary: _____
- [ ] The original remains the source; the AI summary is a working brief.

Check the few details that would change your decision or cause harm if they were wrong.

Continue on H5W

Source guide: https://www.h5w.com/how-to-summarize-a-pdf-with-ai/

File upload safety checklist: https://www.h5w.com/is-it-safe-to-upload-documents-to-ai/

Check whether an AI answer is correct: https://www.h5w.com/how-to-check-whether-an-ai-answer-is-correct/

Information last verified: October 18, 2026. This resource is general educational guidance. Check current official rules and professional advice when the decision is high impact.