Session 1 Handout: Your Job's Top Ten Tasks

FAST-06 Occupation-Specific AI Role Labs · 7formations · Instructor: Wadood Chaudhary · All examples fictional

Why this session matters

General AI training tells you what the tools can do. This course starts from what **your job** does: the ten tasks that eat your week. You'll rate each for AI fit and data risk with peers who do the same work, learn the data rules specific to your role, and turn your first two tasks into procedure cards.

Key concepts

1. Start from tasks, not tools

List the ten tasks that take the most hours per week. Use general names ("answer guest pre-arrival questions," "explain monthly variances to clients"), not specific cases. Same-occupation peers help you spot tasks you forgot and merge duplicates.

2. Rate fit and risk

AI fit	Meaning
Good	Clear source, low harm if wrong, easy to check
Use with care	Useful, but a mistake matters; needs a strong check or approval
No AI	Involves data that can't go into the tool, or a judgment about a person

Data risk	Meaning
Low	Public or internal generic content
Medium	Internal business data; sanitize first
High	Personal information, PHI, applicant/employee records, client financials

High risk usually means "no AI," or a different task: a template with placeholders instead of the real record.

3. Role-specific data rules

Track	Never enter
HR and recruiting	Applicant resumes, employee records, complaints, medical/leave details
Bookkeeping	Client names with account/card numbers, SSNs/EINs, statements
Healthcare front office	Any PHI, including name + appointment date
Customer service and sales	Customer names with contact, order, or card details; purchased lists
Project coordination	Customer confidential drawings and pricing; employee performance notes

Track	Never enter
Office support	Employee DOB, ID or loyalty numbers, home addresses, HR files

Massachusetts personal information (G.L. c. 93H, 201 CMR 17.00) = name + SSN, driver's license/state ID, or financial account/card number. PHI is protected under HIPAA. HR postings: employers with 25+ Massachusetts employees must include a pay range (G.L. c. 149, §105F, since October 29, 2025).

4. The procedure card

Field	Example (HR: inclusive posting)
Task and trigger	New role approved for posting
Data rule	Skills list and approved pay range only; no applicant data
Steps	1) Get skills list and range from the hiring manager 2) Run prompt 3) Check 4) Hiring manager approves 5) Post
Prompt	Five-part prompt with bias-language self-check
Check	Pay range exact; no age/gender-coded words; required qualifications job-related
Time	By hand 45 min; AI 3 + check 10 = 13 min

Worked example: a front-office inventory (excerpt)

Task	Hrs/wk	Fit	Risk	Reason
Confirm appointments by phone	6	No	High	Patient-specific; stays in practice system
Rewrite patient handouts in plain language	1	Care	Low	Generic templates; dentist approves
Answer common phone questions	5	Good	Low	Script from policy sheet
Draft insurance appeal letters	3	Care	High → Low	Template with placeholders only
Summarize chart notes for referrals	2	No	High	PHI

Checklist: inventory done right

- ☐ Ten tasks with hours per week.
- ☐ Each rated for fit and risk, with a reason.
- ☐ At least one "no AI" considered honestly.
- ☐ My role's never-enter list memorized.
- ☐ Two procedure cards started.

Do and don't

Do	Don't
Name tasks generally	Describe real customers or patients
Rate with peers	Rate alone from tool marketing
Turn high-risk tasks into templates	Paste records "just once"
Write concrete checks	Write "review it"
Include the pay range in MA postings (25+ employees)	Let AI invent requirements or ranges

Try this at work

1. Track your time for three days and update your top ten.
2. Show your inventory to a colleague in the same role.
3. Pick one good-fit task and run your card on it this week.

Glossary

Term	Meaning
Task inventory	Your top ten tasks by time, rated for fit and risk
AI fit	How suitable a task is for AI assistance
Data risk	Sensitivity of the data the task involves
Procedure card	Steps, prompt, check, time, data rule for one task
Placeholder	A marker like [PATIENT] that replaces real data in templates

Key takeaways

- Start from your tasks, not the tool.
- Know your role's never-enter list.
- Every procedure needs a concrete check.