# Quick-Reference Card: Occupation-Specific AI Role Labs

FAST-06 · 7formations · Instructor: Wadood Chaudhary

## Rate every task

**Fit:** good · use with care · no AI **Risk:** low · medium · high

## Never enter (by role)

| Role | Never enter |
|---|---|
| HR | Resumes, employee records, complaints, medical/leave details |
| Bookkeeping | Client names + account/card numbers, SSNs/EINs, statements |
| Front office | Any PHI (even first name + appointment date) |
| Customer service/sales | Customer contact, order, card details; purchased lists |
| Projects | Customer confidential drawings/pricing; performance notes |
| Office support | DOB, ID/loyalty numbers, home addresses, HR files |

## Sanitize: strip · keep · stop

Sanitize **before** the prompt. Never ask the AI to remove data for you.

## Procedure card

Task and trigger · data rule · steps (with file locations) · prompt · **concrete check** · time (by hand vs. AI + check) · owner and last tested

## Concrete checks by role

HR: pay range exact (MA, 25+ employees: G.L. c. 149, §105F); no coded language Bookkeeping: amounts match report; causes only from notes Front office: clinical text unchanged; clinician approves Customer service: answers in approved FAQ; no new promises Projects: status/date/owner match notes; TBD if unknown Office support: test rules on 10 messages; before/after compare

## Peer review (W4)

Could follow? · check concrete? · data rule right? · time realistic?

*Massachusetts personal information (G.L. c. 93H, 201 CMR 17.00) and PHI never go into prompts. You send it, you own it.*