PII Handling Quick Card — Document Processor

Rule 1: Treat resumes as personal data. Keep access limited to Recruiting and HR.

Rule 2: Do not paste full document content into Teams messages. Share a link to the SharePoint file instead.

Rule 3: Mask sensitive values in logs and notifications (e.g., bank details, IDs).

Rule 4: Keep exception notes short and factual: suggested type, confidence, missing fields.

Rule 5: Retention guidance (fictional): invoices 7 years, contracts 7 years after termination, resumes 12 months.