**Forums Guidance for using Artificial intelligence (AI) for note-taking**

AI recording tools can be a useful reasonable adjustment in online meetings. However, they have data protection implications which must be considered by forums or their partners.

Below are the steps forums should take in order to use AI for note-taking.

**Inform Participants**

Always inform meeting participants that you intend to use AI notetaker/recording tools. Get active consent from everyone in the meeting and send a link to the privacy notice in your meeting invite. Make clear who any meeting notes will be shared with so they can give informed consent.

**Obtain Consent**

Get explicit consent from all participants before recording or taking notes using AI tools.

**If everyone does not give their consent**

If one person does not give consent, you should not use the AI notetaker at all in that meeting. This shows transparency and respect for their privacy. Respect their choice if they do not wish to be recorded.

If you’re not hosting/chairing the meeting, you should check with the host ahead of the meeting to ensure it’s acceptable to use an AI tool. If the meeting host agrees that it could be used, they will need to inform participants and check they have everyone’s consent before it is switched on.

Possible alternatives if participants do not consent, or if there are confidential items being discussed in the meeting, include:

* Use meeting captions (without them being recorded)
* Ensure someone is taking minutes
* Use the meeting chat to guide the discussion
* Respect breaks and confidentiality
* Pause recording/AI notes taken during breaks or when discussing confidential information. Ensure that sensitive information is not recorded inadvertently.

**Sharing**

Consider: Do you have the right to share these notes? Are the participants aware who they will be shared with? Some AI note-takers automatically send the notes to everyone who was invited to the meeting, including those who did not attend.

If the AI notetaker you use has a ‘automatic sharing’ feature, make sure this is turned off.

Ensure the notes are reviewed and edited as necessary before sharing. For example, you may wish to remove personal information about other individuals, such as children’s names, which was shared in confidence and should not be stored in writing. Consider that if personal data is discussed and stored in the transcript, it may be subject to Subject Access Requests.

**Concerns and Considerations**

Privacy: Be aware of privacy regulations and ensure that recorded content is stored securely and accessible only to authorised individuals.

Data Security: Verify that the AI notetaker/recording tool follows security standards and does not expose sensitive information to unauthorised parties.

Consent and Legal Obligations: Understand and adhere to legal requirements about consent, data retention, and disclosure when using AI notetaker/recording tools. Ensure you know where the transcripts are stored, so that they can be deleted when no longer needed.

Training and Awareness: Educate all meeting participants on the proper use of AI notetaker/recording tools and their implications.

Regular Review: Periodically review recorded content to ensure accuracy and relevance. Delete recordings when they are no longer needed.

Accuracy: Be aware that AI notetaking is not always 100% accurate and that there may be errors in the transcript. Ensure you review the notes and any actions before sharing.

**Guidance about specific tools and software to use**

Some organisations are only using Microsoft Teams’ own transcription functionality, where possible. This can only be used on Teams. Microsoft Teams will automatically send a notification to all attendees, but you still need to get consent from attendees, as above.

AI software which has we believe has a better approach to data protection and GDPR than other alternatives is Jamie: Jamie <https://www.meetjamie.ai/> There is a cost to using this which will need to be agreed with your forum steering group/Trustees/Directors.

AI tools that we have concerns relating to Data protection and GDPR risks include Otter AI . An example of this is that once you sign up to it, it can access your Teams calendar and may send emails to your meeting invitees without your knowledge or consent.

For either tool, the following guidelines apply:

* Remember that the transcript is not perfect, will have errors, and may misrepresent what people have said.
* Do not share the ‘raw’ (unedited) transcript with other participants. Edit the transcript first.
* Do not share the transcript via a direct weblink to the software. Edit it first (for example in a Word document).
* Once edited or viewed for personal use, delete the ‘raw’ transcript from within the software. Remember that if the transcript is stored, it will be an official record of the meeting, and the forum may need to provide it in a response to Subject Access Requests; complaints etc. In the case of transcripts in MS Teams, you can delete it from within MS Teams and/or from within OneDrive.
* Remember to let participants know that you will be transcribing the meeting. Microsoft Teams will show an alert to participants, when the transcription starts. Nonetheless, it’s still good practice to let people know, and give them the opportunity to make any comments before the transcription starts.

AI tools are still evolving, and we will continue to review both AI tools and guidance.

The guidance contained here is for general information purposes only. It is not intended to serve as legal or professional advice.  We recommend this is reviewed and tailored to meet your forum’s specific needs. This will include the legal, operational and regulatory requirements relevant to your forum.

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