Title: Guidelines for Generative Artificial Intelligence (AI) Note-Taking Tools
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Considerations for the Implementation of Generative AI Tools at Temple University
Generative Artificial Intelligence tools (such as ChatGPT, Gemini, Perplexity, Dall-E, etc.) can create new content by drawing on human-created text, images, and video in their data set. These large language models (LLMs) do not have cognition; they cannot think. Instead, they work by finding and replicating the most common patterns available in the enormous and varied dataset on which they have been trained.

New generative artificial intelligence (AI) tools will benefit the Temple University community. It is essential, however, that the university promote responsible use of these AI tools. University guidelines and policies for the use of AI tools include the following considerations:
- Alignment of the use of the tool with university business needs and goals
- Alignment of the use of the tool with inclusive and effective pedagogical practices
- Confidentiality, data privacy, and security that mitigates AI-related risks
- Transparency of use
- Accessibility
- Equity of access and use
- Agency of those affected by the use of AI

This document clarifies the policies regarding AI note-taker tools at Temple University (such as Zoom AI, Otter.AI, and Reader.AI) and guidelines for best practices in using these tools.

What is an AI Note-taker, and How Does It Work?
Third-party AI note-takers such as Zoom AI Companion, Reader.AI, and Otter.AI are designed to serve as a proxy for the attendee of virtual meetings, i.e., the tool itself attends a recorded meeting instead of the user and then, using the power of generative AI, generates a report for the individual summarizing the contents and key topics of the meeting. The recording transcript generates the meeting notes as the text input.

Which tools are allowed at Temple, and which are not permitted?
Certain functions in Zoom AI Companion will be enabled for use at Temple University. *Meeting Summary with AI Companion* uses a [temporary meeting transcript](#) to generate a detailed summary of your meeting so you can choose whether recording the meeting is necessary. It organizes your meeting summary by topic so you can read what was discussed and who said what. Crucially, it also identifies any next steps or action items based on the content of the meeting. And if you just want a short paragraph on the meeting, it can provide a quick recap at the top for an abridged version. *[Meeting Questions with AI Companion](#)* provides meeting participants with an AI chatbot that one can use to explore the proceedings of a meeting in real time. For example, a participant can ask, "What's been discussed so far in this meeting?" or "Can you rephrase what was just discussed?" The AI companion chatbot will

respond in real-time. [Zoom Whiteboard Content Generation](#) allows for content generation and organization of ideas.

All other third-party AI note-takers (such as Reader.AI or Otter.AI) and any other third-party proxy are **prohibited** in all Temple-owned Zoom sessions, Microsoft Teams meetings, and other teleconferencing and meeting spaces. Temple University has no way to verify the security of these third-party tools. Furthermore, Temple cannot control what data these tools collect and how that data is used. Finally, a key difference between Zoom AI Companion and other third-party tools is that only the host of the Zoom meeting will control Zoom AI Companion functionality in the meeting.

Any meeting host who encounters the unauthorized use of the prohibited tools is directed to remove the proxy from the meeting and lock the meeting. Furthermore, suppose the end user of the tool can be determined. In that case, they should be warned that further use of such tools violates Temple technology guidelines and could result in disciplinary action.

Which functions in Zoom AI Companion will not be allowed and why?
Smart Recording with Zoom AI Companion will not be allowed. Since this function works after the Zoom meeting to summarize the meeting proceedings, it does not request consent. Temple will not allow the use of any AI technology without the express permission of meeting attendees.

Who controls Zoom AI Companion in a virtual meeting or class?
The Zoom AI Companion can only be enabled by the meeting host, who will determine if and when it is appropriate to use the tool. The host will have the ability to turn Zoom AI Companion features off or on for each meeting. The host may also turn the Zoom AI Companion on or off during the meeting.

Can I put the Zoom transcript or recording into an AI tool such as Perplexity or ChatGPT?
Yes, but you must request student consent. You should also consider the nature of the content you input into the AI. Remember that Large Language Models (LLMs) are not secure spaces for information, and you must take sensible precautions with the information you input into an AI to protect privacy and confidentiality.

Guidelines on Best Practices for Using Zoom AI Companion
The context of your class or meeting matters in your decision whether to use AI.

Reasons why you may want to use Zoom AI Companion:
- *Students may use Zoom AI Companion notes outside class to review material.*
- *Attendees who must miss a meeting or class can access session notes.*
- *Students with spotty internet service can access the summary at times other than normal class times.*
- Students or staff can ask questions of the AI during the meeting to clarify terms or concepts with which they are unfamiliar.

Reasons why you may not want to allow Zoom AI Companion:
- *Some meeting or class participants may feel that their privacy is compromised if an AI records them.*
- *Meeting/class participants may not want their contributions captured by an AI tool.*
- *Some students or meeting attendees may be unwilling to contribute willingly or openly in discussions if they know they are being surveilled by an AI tool.*
- *There may be concerns about an AI tool gathering data on meetings or class discussions.*

- *There is value in the work of taking notes, which the use of AI note-takers may eliminate.*
- *There is nuance in human-taken notes that the AI note-taker may miss.*
- *Students may believe that they no longer need to attend class or arrive on time to class if an AI Companion is available for use.*

Should I use Zoom AI Companion if My Class or Meeting Has Sensitive or Controversial Content?

If the material discussed is of a sensitive or controversial nature, Zoom AI Companion should not be used for several reasons. The AI tool will gather data and record comments made during the session. Any notes created by the AI and distributed to participants can be redistributed inappropriately. In addition, attendees may be unwilling to share their thoughts freely if they know that an AI note-taker is recording them.

What if I have a student or staff member with an accommodation who requests using an AI Companion?

You may have students or staff for whom the use of Zoom AI Companion helps satisfy an accommodation they require, as it can take notes for the session. If no other students or staff decline consent to use the tool, you should enable it and provide notes for the entire group. If there are students or staff who do decline consent to use the tool, you need to work with DRS or HR to find a suitable option that includes all students and staff or use an alternative manner of providing notes. You may also have students or staff whose accommodation states that you may not use Zoom AI Companion. See the suggestions below for creating an inclusive environment, and note that you may contact a DRS or HR staff member at any time to discuss options.
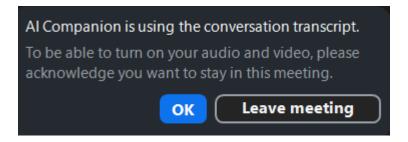
Syllabus statements on the use of AI note-takers

If you do allow the use of Zoom AI Companion in your class, always include the following in the syllabus statement:

> Any AI-generated notes permitted in this class can only be used for the student's personal educational use. Students are not permitted to copy, publish, or redistribute any portion of AI transcripts from any portion of the class session to individuals who are not students in the course or academic program without the express permission of the faculty members and any students enrolled in the class. Distribution without permission may be a violation of educational privacy law, known as FERPA, as well as certain copyright laws. Any AI-generated notes distributed by the instructor or university of this course are the property of Temple University.

Obtaining Consent from Meeting/Class Participants

When Zoom AI is enabled, consent will be requested from participants in the Zoom session. It will give participants a choice to either consent to the use of the tool or to leave the meeting. Choosing OK will signify consent. If the participant chooses neither option, the participant will not be able to turn on the mic or video for the remainder of the meeting. Therefore, the only option available if a participant does not consent is to remain muted or to leave the meeting.

AI Companion is using the conversation transcript. To be able to turn on your audio and video, please acknowledge you want to stay in this meeting.

OK   Leave meeting

Participants may also be unwilling amongst their peers to state their preference that Zoom AI Companion should not be used for fear of inconveniencing others or appearing to be difficult. Therefore, we recommend the following best practices:

- Explain to students or staff ahead of the Zoom meeting how Zoom AI Companion works and why you may want to use it.
- Students/staff should be surveyed before the class/meeting to determine if they are comfortable consenting to the use of Zoom AI Companion being used in the course. In the survey, it is best to ask the reasons for any discomfort, as there may be workarounds that satisfy those concerns. If any students/staff are uncomfortable with the AI, see our suggestions below for alternative methods of creating notes.
  - **If even one student/staff member indicates that they do not wish you to use Zoom AI Companion, it is best to use other notetaking methods instead.** See "Alternative Methods for Notetaking" below**.**
- Make it clear to students or staff that they should inform you if they have changed their minds at any time.
- Make it clear to students or staff that, even if they consented, they may reach out to have a portion of their contribution deleted from the transcript if they decide that those contributions should not be in the transcript.
- An option to balance privacy with the tool's utility and to ensure that private and/or sensitive information is not recorded in the notes is to pause the recording during these conversations and breaks in class. Being transparent about this action can build trust within the classroom or meeting and make consenting to the tool more palatable for some participants.
- In all cases, students or staff members who wish not to have the tool present in class should be prioritized over those who wish to use the AI note-takers, except in cases of accommodation. When there is an accommodation need, a DRS specialist can help find a workable solution to satisfy all parties.

Distribution of Transcripts from Zoom AI
Only hosts have access to meeting/class notes and are able to share those notes with participants in the meeting/class.
- Please keep in mind that the Zoom AI Companion is capable of making errors. Hosts should review and edit the transcripts for accuracy and completeness before distributing them.
- Hosts should consider whether sensitive material that arose unexpectedly in the class or meeting should be removed or edited.

Best Practices for Using Zoom AI Companion

Like the output of any large language model generative AI, Zoom AI Companion can create output that looks good on the first pass but contains serious errors. Therefore, any meeting summary created by Zoom AI Companion must be vetted for completeness and accuracy. One option is for the host or a designated assistant to review the summary after each meeting, make any necessary corrections, and email it to all concerned parties, or post it to a shared space (Canvas, a shared Google Doc, Sharepoint, etc.).

Although instructors may find it useful to do this work on their own, we recommend assigning the review of notes to students instead. Small teams of students can be tasked with reviewing the AI summary, comparing it to their own notes from class, and then submitting a revised version that you can publish to the whole class. Canvas Collaborations or Group Discussions could be used to facilitate the process. This task can be a graded assignment, extra credit, or simply an expectation for making the course more accessible to all students. Whichever method of collection and sharing you choose, consider requiring each team member to submit a copy of their own notes with the group summary revision. Thus, for any given meeting, all members of the summary editing team will need their own set of notes.

If instructors review the meeting summaries independently, any grievous conceptual error creates further learning opportunities. For the next class period, present the error in a handout or slide and prompt students to discuss it in small groups, asking them questions such as "What is the error?" and "What would a correct note look like?" Follow up by including the error in your next quiz or exam.

Whatever means you devise for participants to receive the AI-generated meeting summaries must be via a lens of firm skepticism. We jeopardize our administrative effectiveness and our students' education if we allow the tool to act as a substitute for intellectual effort.

Alternative Methods for Notetaking Without Using Zoom AI
When a student or meeting participant does not consent to Zoom AI, you should not use Zoom AI Companion. The following are alternatives you may consider using for a student needing an accommodation:

- If the class or meeting participants have agreed to be recorded in Zoom, provide the recording from the session to all students. While this may seem the same as using Zoom AI, note that some people may object to the use of AI because it captures data to train its model.
- Assign all students in the class to a study partner or study group to compare notes, fill in gaps, and answer questions for each other.
- Provide guided notes outlining the session's key points, leaving blank spaces for students to fill in additional information.
- For more on these ideas, see *Accommodating Note-Taking* (2024).