

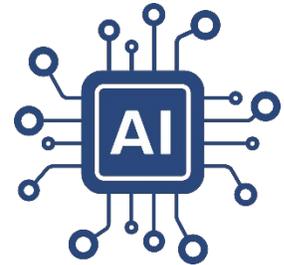
## Artificial Intelligence (AI) Guidance

# AI Transcription & Recording Best Practices

## Acceptable Use

### DO:

- ✓ Use only approved enterprise tools
- ✓ Disclose the AI technology being used
  - Verbal & written if possible
- ✓ As a meeting host, obtain required consent before recording
  - Unanimous consent as default standard
  - If a participant would like to opt-out, do not use AI transcription or recording
- ✓ As an attendee, ask/verify if the host is planning to use AI transcription or recording at the beginning of the meeting if the organizer has not clarified
- ✓ Be intentional with recording decisions (avoid 'always-on')
- ✓ Review and correct AI-generated transcripts for accuracy before using for decision-making
- ✓ Maintain "Created by AI" (or similar) notation on AI transcriptions
- ✓ Store recordings according to your agency data classification requirements and follow data retention policies and dispose properly
  - Store, retain, and dispose of recordings according to your agency's policies
- ✓ Opt-out of vendor data sharing and model training, where applicable
  - Not applicable in Microsoft Teams on IOT SOI tenant



### DON'T:

- ✗ Record without required consent from all parties
- ✗ Record confidential matters:
  - Legal consultations
  - Performance discussions
  - PHI/PII conversations
  - Proprietary agency information
- ✗ Use unapproved tools or allow external participants to record with their tools
- ✗ Remove AI watermarks or disclaimers
- ✗ Make decisions based on solely on automated AI transcripts you have not reviewed
- ✗ Share recordings externally without agency authorization
- ✗ Allow vendor use of data for model training (verify opt-out)
  - Not applicable in Microsoft Teams on IOT SOI tenant

## Disclosure Example

Script: "Before we begin, this call will be recorded and transcribed using AI for [intended purpose]. Does anyone have an objection?"

Document consent in recording or notes.