



AI Notetaking Tool Privacy Evaluation Matrix

Use this matrix to evaluate vendor privacy practices before using AI notetaking tools in meetings.

Privacy Measurement	Evaluation Criteria	✓ Green Light (clear)	⚠ Yellow Light (proceed with caution)	⊖ Red Light (roadblock – IT or legal review)
Notice & Consent				
Meeting Participation Consent	Are meeting participants prompted to consent to being recorded and to AI use of notetaking in meetings?	Consent pop up for all participants to agree before recording begins and when a person joins a meeting after it has started.	Pop-up but no affirmative consent required; passive consent established by remaining in meeting	No participant notification or consent process.
Calendar Integration	Will the tool join calendared meetings even if the user does not attend?	Requires explicit confirmation before joining. User must activate for each meeting.	Uses previous setting without requiring activation for each meeting.	Auto-joins meetings from calendar without confirmation from user and without ability to be disabled
Recording Notice	Is there a clear and unambiguous notice that recording/transcription is happening?	Clear alert or noticeable banner to all participants	Subtle visual cue (e.g., logo only)	No recording notice or merely displaying participant box without clearly labeling as AI notetaker tool (company name on bottom of screen is not sufficient)
Privacy				
Auto Distribution of Notes	Are notes automatically shared with all meeting participants?	Distribution of notes, summaries, and/or meeting recordings controlled by user	Optional settings may auto distribute notes and/or meeting recordings.	Notes and/or recordings are auto distributed to all participants by default
Access Requirements	Do recipients need to sign up to access notes/summaries?	No signup or account creation for third-party service required; direct access available	Optional signup but only for enhanced access	Signup or account creation required to view content
Customizable Privacy Settings	Is there an ability to enable heightened privacy settings that limit disclosure and use of data?	Paid service with clear cost structure & ability to enable heightened privacy settings	Free – able to adjust privacy settings	Free – no ability to adjust privacy settings & current settings are inadequate
Data Privacy Agreement (DPA)	Has the vendor signed California's or National data privacy agreement? (This is different from a DPA that the vendor might have drafted on their own)	Yes – confirmed signed and current DPA on file	Pending or unclear – needs verification. Check if there is a signed DPA with your district	Refuses or has not signed DPA
Vendor Compliance	Does the vendor comply with CA and federal staff privacy obligations (e.g., Ed Code 49073.1 and FERPA)?	Contract or DPA includes explicit compliance with 49073.1, FERPA, and applicable education privacy law	Claims general compliance, but lacks specifics or jurisdictional terms	No indication of legal compliance
Data Collection & Use				
Data Collection	What type of data is collected and what data is shared in the meeting (e.g., voice, identity, meeting content)	Collects only necessary data (e.g., voice + transcript);	Collects extensive meeting metadata or staff identifiers	Captures sensitive data like biometric voiceprints, location, or off topic content
Purpose Limitation	Is data use clearly limited to providing the AI notetaking service?	Contract limits use of data to transcription and providing services only	Vague or open-ended purposes (e.g., 'service improvement' or 'business purposes')	Allows use for unrelated purposes (e.g., advertising, analytics resale, targeting advertising)

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Third-Party Sharing	Is data shared with other vendors or entities?	No third-party sharing, or only with sub processors who are bound to same privacy terms	Sharing with subprocessors with no mention of binding subprocessors to privacy terms	Shared with parties outside of subprocessors such as advertising related vendors (look for ‘business partners’, ‘promotional services’)
Security & Retention				
Data Retention & Deletion	How long is data retained, and can it be deleted?	Data auto deletes after short term or upon request (satisfied if there is an executed CA standard DPA)	Long or unclear retention period	Retained indefinitely; deletion is unavailable or denied (might be permissible if no student data is shared with the tool)
Security Controls	Are reasonable security measures in place to protect data?	End-to-end encryption, role-based access, security audits (look for language saying vendor will follow ‘industry standards’; satisfied if there is an executed CA standard DPA)	Some basic protections, but no ability to audit	Unencrypted storage, no access control, or known security gaps
Accuracy				
Accuracy Disclosure	Does the tool publicize its transcription accuracy rate?	Accuracy metrics disclosed	Mentions accuracy but no supporting data	No mention of accuracy rates
AI Hallucination Risk	Does the tool disclose risks of generating inaccurate or fabricated content?	Vendor discloses hallucination risks and accuracy limits	General caution about accuracy but not specific	No mention of hallucination or accuracy concerns
IEP Approved	Is this application legally safe to use during an IEP Meeting?	Yes, meets all privacy and recording rules	Product makes claims to safeguard student data, yet no way to verify where data resides or retrievable via PRA.	Complete disregard for privacy information
Does the existing BAA agreement cover the integrated AI notetaking feature	Has the BAA been updated and reviewed by both parties to include AI features integrated in the application	Yes	Existing BAA covers HIPAA and other concerns, but does not reference AI features introduced since executed	No, and the vendor is unwilling to include AI features in BAA
Are notes/transcripts produced by AI agent WCAG 2.2 compliant?	If notes/transcripts produced by the AI agent are presented in web format or standard text, WCAG 2.2 compliance may be applicable, especially in IEP/SpEd and publicly accessible settings.	Yes, the vendor can confirm output is WCAG 2.2 compliant	The vendor can produce output that is editable by LEA, but LEA must ensure compliance	No, the vendors output is not compliant, nor is provided in a format that can it be easily edited or converted
Identifies who is recording?	AI tool includes information on who in a meeting is using the AI notetaking function.	Yes, while in meeting it is clear who is using the AI notetaker.	It is not explicitly clear who is using the AI notetaker but that information can be found.	No, the tool does not disclose who is using the AI notetaking tool.
Only host and/or co-hosts can control recording	Only host can control use of recording and AI notetaking.	Yes, only host has ability to use AI notetaking tool and recording feature or can delegate responsibility	Anyone in the meeting can use an AI notetaking tool but the host has the ability to disable use in the meeting	Anyone in the meeting can use an AI notetaking tool

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