



Guidelines for Administrative Use of Generative Artificial Intelligence Chatbots & Assistants

Topic:	AI Chatbots & Assistants
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1. Purpose

York University supports the responsible and ethical use of generative AI tools, but there are important considerations when using them, including cost, information security, privacy, and compliance. These guidelines are intended to provide guidance on the use of AI Chatbots and AI Meeting Assistants and supplement York's existing [principles](#) and [guidelines](#) for the use of generative AI.

2. Scope and Application

These guidelines apply to employees, contractors, or third-party agents involved in non-academic, university administrative or operational activities.

3. Definitions

AI Meeting Assistants are software tools that use AI to capture, transcribe, and summarize meeting discussions. It automates note-taking and organizes key points, decisions and action items for participants. These tools may be built into collaboration platforms such as [Zoom](#) or offered by third-party vendors. Examples of AI meeting assistants are: Otter.ai, [MS Copilot](#), [Zoom AI Companion](#).

AI Chatbots are software applications that use AI to understand and respond to user queries in natural language. It simulates human-like conversation through text or voice interfaces and can automate tasks or provide information. AI chatbots often learn and improve over time based on interactions. Examples include OpenAI's ChatGPT, Anthropic's Claude, and Google's Gemini.

4. AI Meeting Assistant Guidelines

AI Meeting Assistants offer legitimate and useful capabilities, including transcribing and summarizing online discussions and support accessibility and documentation requirements. However, their use also introduces privacy, regulatory, and legal risks and may affect open discussion. Specific risks/considerations should include:

- Recorded discussions and summaries/transcripts may be subject to legal discovery in future litigation.
- Participants may be recorded without their awareness or consent.

- Creating and distributing AI-generated transcripts and summaries could stifle open conversation and discourage some meeting attendees from fully participating.
- Personal and confidential information may be exposed to third parties or used to train AI models without proper safeguards.
- Summaries may be inaccurate (e.g., “hallucinations”) or miss important context. Meeting content may be preserved indefinitely or shared with third parties, increasing the risks of inappropriate distribution and unauthorized access.

To this end, the following guidelines apply to the use of AI Meeting Assistants at York University:

- **Approved AI Meeting Assistants & Governance**—Only approved AI Meeting Assistants can be leveraged for internal York University virtual meetings. Meeting controls should be used to block all unauthorized bots. To request approval for new AI assistants, complete the [CTRA intake form](#). For more information, visit the [Cyber Threat and Risk Assessment website](#).
- **Meeting Participant Consent**—All participants of the meeting must be both notified and consent to the use of the AI Assistant. The AI assistant should not be used if any participant objects to its use.
- **Generated Summary Verification & Management**—All AI-generated summaries should be reviewed and their accuracy verified before sharing. Sharing of AI summaries to participants outside the meeting should be on a need-to-know basis. Meeting summaries should be deleted when no longer needed. Some sensitive discussions and interactions are not meant to be recorded; avoid using AI meeting assistants during these conversations.

5. General AI Chatbot Guidelines

York University supports the use of GenAI chatbots. However, the use of non-public/internal York information assets is restricted to only approved AI chatbots. Use of AI chatbots at York should align with York’s [AI principles](#) and [Guidelines](#).

- **Approved Tools & Governance**—If wanting to use an AI chatbot that has not been approved with York data or information, complete the [CTRA intake form](#). For more information, visit the [Cyber Threat and Risk Assessment website](#)
- **Data Protection**—The data processed through AI tools and associated models must correlate with [the risk associated with York’s AI data classifications](#).

6. Approved AI Meeting Tools and Assistants

- **Microsoft Copilot**—York University has an enterprise license for Microsoft Copilot, which is available to the York community. When logged in using York credentials, data is not shared with Microsoft or York. There are other Copilot licenses available (GitHub, Microsoft 365 Copilot, etc.) that can be purchased separately. Please reference our [UIT website](#) for further information.
- **YU Automated University Resource Assistants (YU AURA)**—York University provides a Generative AI framework, **AURA**, enabling York’s community to **leverage** insights and automation with York’s internal information. Please reference our [UIT website](#) for further information.

- [Zoom AI Companion](#)—York University enables Zoom AI Companion to enhance meeting efficiency by generating automated meeting summaries and highlights. If enabled by the host, you can interact with a chat-like feature **that identifies insights from the** meeting discussion. Please reference **our** [UIT Website](#) for further information.

Related policies, procedures and guidelines:	<ul style="list-style-type: none">• Information Security Policy• Information Classification Guidelines• Principles and Guidelines for Use of Generative Artificial Intelligence
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