

Navigate360: Meeting Summary Assistant Best Practices

The Meeting Summary Assistant allows users to live transcribe and use AI to summarize a meeting transcript, attachments, or text put in a user's Appointment Summary or Notes.

1. Live Audio Transcription Best Practices

- Live transcription uses computer microphone to capture audio. Users must accept microphone settings in their browser when starting transcription.
- When clicking *Start Transcription* users **MUST** ask all participants for consent to transcribe the appointment by AI and acquire verbal consent to the meeting being transcribed.
 - This **REQUIRES** users to verbally identifying the participants (i.e., Speaker 1 is the Advisor/Professional Staff and Speaker 2 is the Student) at the beginning of the conversation to ensure the transcription captures who is speaking. The advisor or professional staff **MUST** have the student verbally provide their consent to the meeting being transcribed so it is captured in the summary. The Appointment Summary below visually displays how the summary should be set up when using the live transcription.

The screenshot shows a web interface for an appointment report. On the left, under 'Appointment Details', there are dropdown menus for 'Care Unit' (Advising), 'Location' (Z Demonstration Location), 'Service' (08 GENERAL ADVISING QUESTIONS), 'Course' (Start typing to search all courses), 'Meeting Type' (IN PERSON), 'Date of visit' (05/11/2026), 'Meeting Start Time' (3:31pm), and 'Meeting End Time' (3:46pm). On the right, under 'Summary Details For Bucky Buc (they/them)', there are three questions with radio button options: 'Discussed Academic Alerts.', 'Discussed ESPR grades.', and 'Discussed Withdrawing from ETSU (All Courses)'. Below this is the 'Appointment Summary' section, which includes a 'Meeting Summary Assistant' icon and a rich text editor. The text in the editor reads: 'Rachel Swatzell (the advisor) and Bucky Buc (the student) held a meeting to discuss the use of AI in Advising appointments. The advisor began by obtaining Bucky's consent to use AI in Navigate to transcribe the session: **Advisor:** Do you [student] consent to using the Navigate AI tool to transcribe our meeting? **Student:** Yes, I consent.' This text is highlighted with a red box. Below the highlighted text, the summary continues: 'The advisor then addressed Bucky's questions about the safety of using AI in Advising safety. Advisor explained that it is safer to use Navigate's AI tool compared to Zoom's live transcription because Navigate does not store audio transcriptions. The advisor also emphasized the importance of following given best practices, noting that a best practice guide is available on the Navigate ETSU website for reference.'

- Users **MUST** review summary transcript to remove FERPA sensitive information. If a student shares sensitive information, be sure to explain this will be omitted from their appointment summary. Sensitive information includes:
 - Student shared details about sensitive or personal referrals (health, disability, etc.)
 - Student shared details about other personal or sensitive concerns (legal, relationship, family)
 - Student shared comments about faculty, instructors, professors

Continue to next page...

Navigate360: Meeting Summary Assistant Best Practices

The Meeting Summary Assistant allows users to live transcribe and use AI to summarize a meeting transcript, attachments, or text put in a user's Appointment Summary or Notes.

- Alternatively, users can use the live transcription as a “voice to text” option after a student finishes their appointment to report appointment summary notes.
- Users **MUST** review and edit summary transcript for clarity and accuracy.
- No audio recordings or transcripts are stored by Navigate360 or third-party services after the summary is saved or the report is closed.
- To stop the transcription, users must click the *Pause Transcription* button. If time is needed in between appointments to finish a summary, open separate tabs for student appointments so transcription notes are not lost before clicking *Save*.
- For *Virtual Meetings*, if users wear headphones while using the live transcription and spoken words are not picked up by the microphone, users can upload a Zoom summary as an attachment for the assistant to summarize instead.
 - **RECOMMENDATION:** Users should run a test summary to make sure the audio is captured.

2. Summarize Attachments Best Practices

- Users **MUST** review and edit *Summary Style* transcriptions for clarity and accuracy.
- When selecting a *Summary Style*, if a user selects multiple styles to find a style they like, the assistant will add all selected styles to the body of the appointment summary. Users will need to delete the unneeded transcriptions.

3. Summarize Text Best Practices

- The *Summarize Text* feature relies on a user to type or paste copied text to transcribe meeting notes. This feature compares to the *Enhance with AI* messaging feature in the platform to refine the *tone* and *length* of text.
- While we do not recommend using *Zoom's AI Companion Meeting Summary* to generate Virtual appointment summary notes, users can paste this transcript into Navigate's *Summarize Text* for refined notes.

4. General Reminders

- The *Meeting Summary Assistant* should be used as a drafting tool, not a summary replacement.
 - Users should treat the assistant as a first-draft generator rather than a final note.
 - Users should review the transcription closely and add context, correct details, and ensure the summary reflects the meeting or support appropriately.
- The Meeting Summary Assistant does not understand acronyms, what you may think an acronym stands for, the assistant interprets something different. Always verify and edit when acronyms are used.
 - **EX: COM** we may think stands for *Change of Major*, where NavAI thinks it stands for *Communications*.
- AI Appointment Summaries should adhere to the *Appointment Summary & Notes Writing Best Practice Guide.pdf*