



Fathom Use Policy

1. Policy Statement

Jessanol Ltd may use Fathom to support meeting note-taking, meeting summaries and follow-up actions for appropriate client meetings.

We use meeting technology to help improve accuracy, reduce administrative burden and support clearer follow-up. We do not use Fathom as a replacement for professional judgement, confidentiality, client care or appropriate data protection practice.

Fathom will only be used where its use is appropriate for the nature of the meeting and where participants have been informed.

2. Purpose

The purpose of this policy is to explain how Jessanol uses Fathom and the limits we place on its use.

This policy supports Jessanol's wider approach to:

- responsible use of AI and digital tools;
- data protection and information security;
- client confidentiality;
- clear meeting records;
- practical and proportionate working methods.

3. What Fathom May Be Used For

Where appropriate, Jessanol may use Fathom to:

- record online meetings;
- produce meeting transcripts;
- generate meeting summaries;
- identify action points;
- support accurate follow-up notes;
- help prepare project records or client communications;
- reduce the need for manual note-taking during meetings.

Jessanol remains responsible for reviewing any AI-generated summary, transcript or action list before relying on it or sharing it as part of client work.

4. What Fathom Will Not Be Used For

Jessanol will not normally use Fathom for meetings that involve highly sensitive personal, confidential or safeguarding-related information.

This includes meetings involving:

- medical or health information;
- children's data;
- safeguarding concerns or disclosures;
- highly sensitive financial information;
- special category personal data;
- criminal offence data;
- detailed HR, employment, disciplinary or grievance matters;
- confidential personal circumstances;
- information about vulnerable individuals;
- commercially sensitive negotiations where recording would be inappropriate;
- any other discussion where recording, transcription or AI-generated summarising would create an unnecessary privacy, confidentiality or security risk.

Where a meeting unexpectedly moves into sensitive territory, Jessanol may stop Fathom recording or pause the meeting to agree how to proceed.

5. Consent and Participant Awareness

Jessanol will not use Fathom covertly.

Where Fathom is used, meeting participants will be informed that the meeting may be recorded, transcribed or summarised using Fathom.

This may be explained through:

- the meeting invite;
- a statement at the start of the meeting;
- the visible Fathom meeting participant or recording notification;
- written confirmation before or after the meeting.

Where a participant objects to Fathom being used, Jessanol will consider the objection and may turn Fathom off, take manual notes instead, or agree an alternative approach.

6. Client Meetings and Confidentiality

Fathom may be used for appropriate client meetings such as:

- project planning meetings;
- discovery or scoping calls;
- general progress check-ins;
- action planning;
- service review meetings;
- non-sensitive operational discussions;
- content or workflow discussions where recording is appropriate.

Jessanol will continue to handle client information confidentially and in line with applicable Jessanol terms, policies and data protection requirements.

Fathom outputs will not be treated as automatically accurate. Jessanol will review summaries, transcripts and action points before using them for formal records, client actions or project decisions.

7. Personal Data and Data Protection

Fathom may process personal data where a meeting is recorded, transcribed or summarised. This may include names, voices, meeting contributions, contact details, business information and other information shared during the meeting.

Jessanol will use Fathom only where there is an appropriate reason to do so and where use is proportionate to the nature of the meeting.

Where Fathom use involves personal data, Jessanol will handle this in line with:

- Jessanol's Privacy Policy;
- Jessanol's Data Protection and Information Security Policy;
- Jessanol's AI Use Policy;
- Jessanol's Data Processing Security Measures, where applicable;
- any agreed client-specific data protection or confidentiality requirements.

Where Jessanol is acting as a Data Processor for a Client, Fathom will not be used to process Client third-party personal data unless this has been expressly agreed in writing and recorded in the relevant Data Processing Form or other written agreement.

8. Storage, Access and Retention

Access to Fathom recordings, transcripts and summaries will be limited to those who need access for legitimate Jessanol business or client service purposes.

Jessanol will avoid retaining Fathom recordings, transcripts or summaries for longer than needed.

Where Fathom outputs form part of a project record, client record or agreed service record, they may be retained in line with Jessanol's retention practices, client agreement, legal obligations or legitimate business needs.

Where a client requires specific retention, deletion or access restrictions, this should be agreed in writing.

9. Sharing Fathom Outputs

Jessanol may share meeting summaries, action notes or follow-up points with meeting participants or relevant client contacts where appropriate.

Jessanol will not share Fathom recordings, transcripts or summaries more widely unless there is a clear reason to do so and it is appropriate, lawful and proportionate.

Before sharing any Fathom-generated output externally, Jessanol will take reasonable care to check that the content is appropriate, accurate enough for its intended purpose, and does not include unnecessary confidential or sensitive information.

10. Accuracy and Human Review

Fathom outputs may contain errors, omissions or misunderstandings.

Jessanol will not rely solely on Fathom-generated outputs for important decisions, contractual commitments, formal advice, complaints, safeguarding matters, legal issues or sensitive personal matters.

Human review remains essential.

Where meeting records are important, Jessanol may confirm key actions, decisions or next steps separately in writing.

11. Client Requests and Objections

Clients and meeting participants may ask Jessanol not to use Fathom for a particular meeting.

Where a request is made, Jessanol will consider the nature of the meeting, the reason for the request, any data protection or confidentiality requirements, and whether manual note-taking or another approach would be more appropriate.

Jessanol may decide not to use Fathom where the meeting is sensitive, confidential, high-risk, or unsuitable for AI-supported recording or transcription.

12. Responsibilities

Overall responsibility for this policy sits with the Jessanol Director.

Jessanol will:

- decide whether Fathom is appropriate for a meeting;
- inform participants where Fathom is used;
- avoid using Fathom for sensitive or unsuitable discussions;
- review Fathom outputs before relying on them;

- handle Fathom outputs securely and proportionately;
 - respond appropriately to objections or concerns.
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13. Related Documents

This policy should be read alongside:

- Jessanol Privacy Policy;
 - Jessanol Data Protection and Information Security Policy;
 - Jessanol AI Use Policy;
 - Jessanol Data Processing Security Measures;
 - Jessanol Business Support Terms;
 - any relevant Data Processing Form;
 - any agreed client-specific confidentiality or security requirements.
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14. Review of Policy

This policy will be reviewed annually or as required.

Owner: Jessanol Ltd

Role Responsible: Director

Version: 1.0

Date: June 2026

Next Review: June 2027

Summary of changes

Created June 2026. New policy introduced to explain how Jessanol may use Fathom to support meeting recording, transcription, summaries and action tracking. The policy clarifies when Fathom may be used, when it will not normally be used, how participant awareness will be handled, and how Fathom outputs will be reviewed, stored, shared and managed in line with Jessanol's privacy, data protection, AI and confidentiality approach.