



Verbit Legal Visor

Ensuring compliance, security
and confidentiality



As legal teams face increasingly complex and challenging matters, adopting the right technology solutions can be of great help in turning the tide. However, leveraging advanced tools in sensitive legal environments requires the utmost care to secure data privacy, regulatory compliance and preservation of attorney work product.

Verbit Legal Visor was developed with these imperatives in mind. Built on Verbit's secure platform and informed by deep legal expertise, Legal Visor delivers accurate, AI-powered transcription and tailored litigation insights without compromising client confidentiality or compliance requirements.

This paper outlines how Verbit Legal Visor meets the rigorous demands of legal professionals through secure architecture, ethical AI practices and understanding of evolving legal standards.

The information provided here is for general guidance only and should not be construed as legal advice.

Secure infrastructure designed for legal standards

Verbit Legal Visor is hosted on Amazon Web Services (AWS), a leading cloud platform known for enterprise-grade security. Each client's data is securely partitioned to prevent unauthorized access or data leakage across accounts.

Strengthening our commitment to information security, Verbit has attained:

ISO 27001:2022

certification, a globally recognized standard for information security management systems



SOC 2 Type II

attestation, demonstrating adherence to trust principles such as confidentiality, integrity and availability



HIPAA compliance,

ensuring that any protected health information included in depositions, case materials or supporting documents is handled in accordance with strict healthcare data privacy laws



Legal teams can trust that their sensitive information is safeguarded by a platform designed to meet robust industry benchmarks for security and data governance.

For full details on Verbit's data protection practices, visit Verbit's [Trust Page](#).

Ethical and case-specific use of AI

A common concern when using AI tools in legal settings is whether proprietary data will be reused to train models and potentially leak sensitive case strategies or information in the process.

Verbit Legal Visor ensures that:

- ✓ Your data is never used to train AI models outside of your specific case.
- ✓ Uploaded materials — such as transcripts, audio recordings or case documents — are only used to improve transcription quality and contextual insights, such as identifying and correctly spelling case-specific terminology or proper names, within your case.
- ✓ No information from your matter is shared with or exposed to other Legal Visor users.

This case-level isolation ensures that your strategy, work product and sensitive case details remain confidential and secure.

Protection of attorney work product

Verbit Legal Visor is not only a tool for transcription but also one for generating strategic insights. These insights are tailored based on context and information that attorneys choose to provide, such as deposition outlines, discovery materials or goal-based annotations.



Transcripts

A deposition transcript (including a real-time transcript) would not be considered work product. As a purely factual account of the questions and answers during the deposition, it would not reflect attorney mental impressions or strategy.

On the other hand, transcripts of internal meetings may potentially be considered as protected by work product doctrine or attorney-client privilege, depending on the underlying nature of the meeting.



Insights

The attorney decides what context to provide to Legal Visor. This may include, for example, case notes, deposition outlines and lists of desired goals or admissions. It may also include curated sets of discovery materials or documents. All the foregoing is clearly attorney work product. Legal precedent such as *Sporck v. Peil*, 759 F.2d 312 (3d Cir. 1985), supports the protection of selected discovery materials and tailored legal interpretations as privileged work product.

Based upon the totality of context provided via upload to the Legal Visor platform, Legal Visor creates insights tailored to this work product. These insights have been “prepared in anticipation of litigation” and as they are tailored to the uploaded work product and are reflective of the attorney’s “mental impressions, strategies or legal theories,” they are, therefore, protected work product.

Deposition use and recording compliance

Legal professionals using Legal Visor during depositions must remain compliant with state-specific recording laws and procedural rules governing notice.

For additional clarity, consider using this sample notice language:

"Please note that, in addition to any formal court reporting services that will be providing the official transcript, counsel for [_____] will also be simultaneously recording this deposition via cloud-based digital real-time transcription to support [party's] attorney review."

We are unaware of any current or contemplated rules or case law that require explicit disclosure that these recordings are for the purpose of deriving insights.

The recording rules for depositions in the top 12 most populous states (and federal courts) can be found in Appendix A at the end of this document. In general, notice is sufficient including in two-party consent states, but it is advisable to confirm that there was prior notification on the record at the actual deposition.

A trusted partner for legal teams

Verbit Legal Visor is designed from the ground up to support attorneys, paralegals and litigation teams that oversee sensitive, high-stakes matters. Its hybrid AI-plus-human approach streamlines complex transcription tasks, while its compliance-first design ensures that users retain full control over their data and strategy.

With Verbit Legal Visor, legal professionals can confidently:

- ✓ Generate accurate, secure, real-time deposition transcripts
- ✓ Leverage custom AI insights that reflect their legal objectives
- ✓ Protect privileged materials under established doctrines
- ✓ Maintain compliance with evolving state and federal regulations

In today's legal world, where efficiency and precision are paramount, Legal Visor offers a secure, compliant and powerful solution to modernize transcription and litigation support.

To learn more about Legal Visor's features and legal-grade protections, visit [verbit.ai](https://www.verbit.ai) or contact our legal solutions team.

Appendix A: Summary of deposition recording rules by jurisdiction¹

State	Rule
Federal	Under FRCP 30(b)(3) , depositions may be recorded by audio or video, based on prior notice.
California	<p>Under the California Code of Civil Procedure, the party noticing the deposition may record by audio or video if the notice of deposition states an intent to do so. Cal. Code Civ. Proc. § 2025.330.</p> <p>California is a two-party consent state (Cal. Pen. Code § 632.) and California courts have held that consent can be implied. See Kearney v. Salomon Smith Barney, Inc., 39 Cal. 4th 95, 118 (2006) (“Thus, if a Georgia business discloses at the outset of a call made to or received from a California customer that the call is being recorded, the parties to the call will not have a reasonable expectation that the call is not being recorded and the recording would not violate section 632.”)</p> <p>Therefore, providing notice of intent to record should create implied consent if the other side shows up to the deposition.</p>
Texas	<p>Under Texas' Rule's of Civil Procedure, videotape recordings of depositions are allowed upon 5 days' prior notice. TRCP 199.1(c).</p> <p>Texas is a one-party consent state.</p>
Florida	<p>Florida Rule of Civil Procedure 1.310(b)(4) allows videotape recording of a deposition upon notice.</p> <p>Florida is a two-party consent state. With respect to oral (in-person recording), the restriction only applies where there's a reasonable expectation of privacy. Florida Statutes 934.02 (“oral communication” means a communication “uttered by a person exhibiting an expectation that such communication is not subject to interception under circumstances justifying such expectation”).</p> <p>With respect to electronic communications, a party attending the deposition after receiving notice of recording can be deemed to be implied consent (although we have not found explicit case law in support).</p>
New York	<p>Under New York's CPLR, depositions may be recorded “by stenographic or other means,” subject to the applicable appellate division rules. CPLR 3113. The Uniform Rules for the New York State Trial Courts, section 202.15, allow “simultaneous audio and visual electronic recording”, in accordance with the remainder of this section.</p> <p>New York is a one-party consent state.</p>
Pennsylvania	<p>In Pennsylvania, depositions may be recorded by simultaneous audio and visual electronic means upon notice. Pa. R.C.P. 4017.1(a).</p> <p>Pennsylvania is a two-party consent state, but courts have found implied consent counts. See <i>Commonwealth v. Byrd</i>, 235 A.3d 311, 320 (Pa. 2020) (detailed discussion and finding that a reasonably intelligent person who proceeds with communication knowing it will be recorded has consented by implication).</p>

State	Rule
Illinois	<p>In Illinois, depositions may be recorded via audio means on notice. Ill. Sup. Ct. R. 206(a)(2), (f).</p> <p>Illinois is a two-party consent state, but attendance after proper notice of recording can be deemed implied consent.</p>
Ohio	<p>Ohio allows recording by other than stenographic means upon notice. Ohio R. Civ. P. 30(b)(3).</p> <p>Ohio is a one-party consent state.</p>
Georgia	<p>Georgia allows recording by audio or audiovisual means upon notice. O.C.G.A. § 9-11-30.</p> <p>Georgia is a one-party consent state.</p>
North Carolina	<p>North Carolina allows recording by audio or audiovisual means upon notice. N.C. R. Civ. P. 30(b)(4).</p> <p>North Carolina is a one-party consent state.</p>
Michigan	<p>Michigan allows recording by audio or audiovisual means upon notice, but the recording must be furnished at the request and expense of the other party. MCR 2.306(C)(2)(b).</p> <p>Michigan is a two-party consent state, but attendance after proper notice of recording can be deemed implied consent.</p>
New Jersey	<p>New Jersey allows recording by audiovisual means upon at least 10 days' notice. New Jersey Rules of Court, 4:14-9(b). New Jersey is a one-party consent state.</p>
Virginia	<p>Virginia does not appear to explicitly require notification of the additional method of recording. Va. R. Sup. Ct. 4:7A(d)(1).</p> <p>Virginia is a one-party consent state.</p>