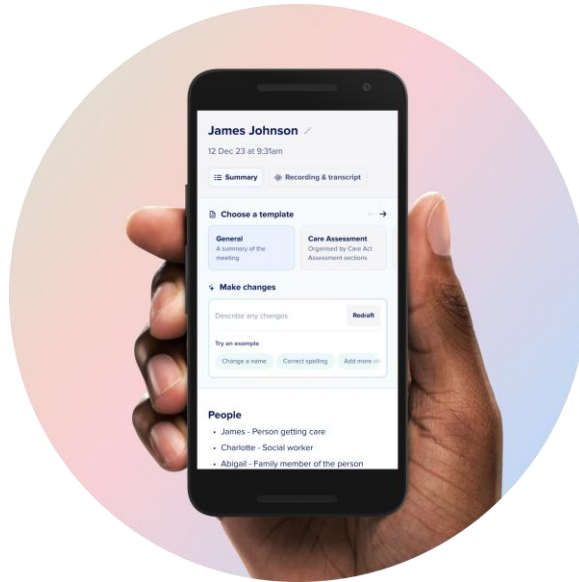


Service Definition Document

Magic Notes is a specialist tool for frontline workers to instantly create detailed assessments. It is created and operated by Beam, a leader in tech-enabled welfare services for local government, who have worked with over 100 Local Authorities across the UK. Magic Notes has been developed in collaboration with Beam's own team of frontline caseworkers and is designed to suit the unique workflows of frontline workers.

How it works

- Magic Notes is a web application that can be accessed from any device with a microphone, such as mobile phone, laptop or tablet. It can be used for both in-person and online conversations, online and offline.
- Frontline workers use the Magic Notes to record conversations. Magic Notes can work with different speakers, languages and accents.
- Once the conversation is complete, Magic Notes automatically generates a summary structured into a template accurately matching the reporting requirements of the organisation, capturing the discussion and actions. The summary is accompanied by a full conversation transcript and the recording.
- To ensure accuracy and human-in-the-loop, users are prompted to review and edit all summaries produced by Magic Notes either directly within the summary, or using AI via a chat interface within the tool. Common examples of changes are to the spelling of a name throughout the summary, to add more or less detail on a specific point, or to reformat the summary into a completely bespoke output.
- There is a citations feature which can be applied per template and which provides references throughout the summary
- Once users are happy with the summary, it can be copy & pasted into internal databases or case management systems. There is no need to manage complex integrations with existing systems, ensuring the 'human in the loop'.
- Users retain access to full conversation transcriptions and recordings as per their organisation's agreed retention policies.



Benefits of Magic Notes

Magic Notes allows users to rapidly produce case notes and assessments, without compromising on quality. Benefits include:

- Reducing time spent on administrative work by an average of 8 hours per week.
- Enabling caseworkers to be more present during assessments by not having to focus on note taking.
- Templates are quality assured during development process to ensure compliance with different reporting requirements, e.g. CQC (Care Quality Commission).
- Increased accuracy in capturing all conversation details.

Security and Privacy

As a social services provider, Beam has a deep understanding of the data protection requirements applied to special category data. Security and data protection are embedded in the foundations of Magic Notes' design, to ensure confidential conversations between caseworkers and clients remain secure. Measures include:

- All data is securely stored and processed in the UK or EEA.
- Beam is ISO 270001 and Cyber Essentials Plus Certified and operates in strict compliance with UK GDPR.
- Data Protection Impact Assessments are co-created and signed off as part of any new partner onboarding.
- Customers retain complete control over their data and Beam does not use transcriptions, recordings, or summaries for any purpose without customer consent.
- There are two login options available:

- Single Sign On (SSO) using Google Workspace or Azure Active Directory. SSO enables an option to enforce Multi Factor Authentication (MFA) via SMS, email or authenticator app.
- Code: identified users enter their work email address and are sent an email with a code, which logs them in to Magic Notes.

Onboarding

Magic Notes is an intuitive, easy-to-use tool accessible to users of all technical abilities. Beam provides an onboarding programme to all new customers as a part of implementation, but the product works out-of-the-box, ready for use from day one.

Magic Notes implementation includes dedicated group training sessions over a mobilisation period (usually 6-8 weeks) and 121 support as needed. Training sessions include:

- Best practice: trainers emphasise best practice, including consent and proper setup for audio capture
- Practical use training: logging in, making recordings and utilising pause, resume and save functionalities, ensuring correct meeting type selection for accurate summaries
- Customisation training: editing summaries, using AI for refinement, correcting errors and adjusting structure and style
- Manager training: ensuring team leaders understand Magic Notes, their access rights, and ability to review team usage.

All users will be provided with a training document and video covering set-up, FAQs, and basic troubleshooting. Additional support can be requested from within Magic Notes, through the "Get Support" feature or by emailing the Support team.

Support

Users have access to email, live chat, and telephone support from the Beam Support team, available 9am-5pm UK time, Monday to Friday.

The support options available to users are:

- Live Zendesk chat: integrated into Magic Notes (see figure 4), links users directly to a Beam customer support specialist via webchat, available 9am-5pm Monday to Friday
- Request 121 support session via webchat or online form
- Email support: available 9am-5pm UK time, Monday to Friday at beam@magicnotes.ai

- Online support centre: a bank of support articles available 24/7, for self service
- User guides and FAQs: these are shared during onboarding and user training, and regularly updated as product changes are made.
- Join a group training or refresher session

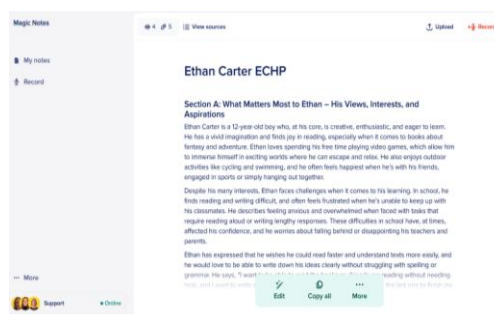
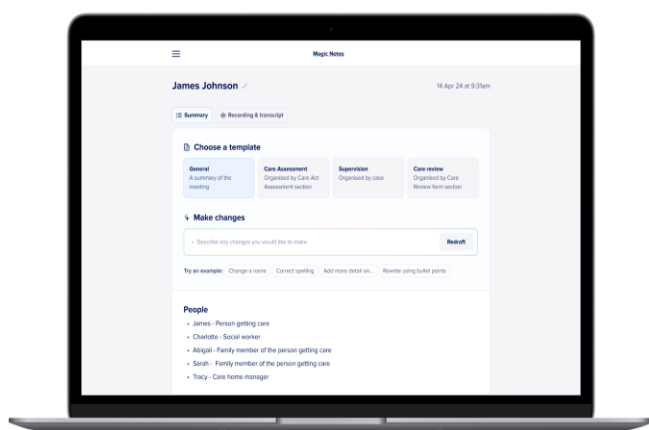
Magic Reports

Powered by **beam**

Magic Reports allows you to create high quality reports in minutes by combining various source materials such as documents, recordings and notes. Reports templates are fully customised and designed for frontline and statutory reports.

How it works

- Magic Reports is a web app that can be accessed from any internet-connected device such as laptop, desktop or tablet.
- Report templates are customised based on customer needs. Standard templates include ECHPs, DoLS Assessments, Children and Families Assessments, and Best Interests Assessments.
- Users select the Report template which they wish to populate, then add files which Reports will summarise. Source files can be uploaded files, pasted text or pulled from Magic Notes, with a range of supported file types including audio and video files. There is no limit to the number of source files uploaded.
- Users select "Create Report", and a draft report is created in their Magic Notes library. Users can use AI or manual edit functionality to make changes to the draft Report.
- Once users are happy with the Report, it can be copied and pasted into Case Management systems or other locations.
- Reports retain the original sources and users are able to run Source Checks on finalised and draft Reports. Users can add more sources over time to reflect the workflow of plans and assessments such as ECHPS.



Benefits of Reports

- Consistent, quality reports
- Increase productivity and clear backlogs - users are able to complete 50%+ more Reports, meet statutory deadlines and clear backlogs by combining human expertise with AI power.
- Fully flexible Reports templates customised to customer requirements

Security and Privacy

As a social services provider, Beam has a deep understanding of the data protection requirements applied to special category data. Security and data protection are embedded in the foundations of Magic Reports' design, to ensure confidential conversations between caseworkers and clients remain secure. Measures include:

- All data is securely stored and processed in the UK or EEA.
- Beam is ISO270001 and Cyber Essentials Plus Certified and operates in strict compliance with UK GDPR.
- Data Protection Impact Assessments are co-created and signed off as part of any new partner onboarding.
- Customers retain complete control over their data and Beam does not use reports or source materials for any purpose without customer consent.
- There are two login options available:
 - Code: identified users enter their work email address and are sent an email with a code, which logs them in to Magic Notes.
 - Single Sign On (SSO) using Google Workspace or Azure Active Directory. SSO enables an option to enforce Multi Factor Authentication (MFA) via SMS, email or authenticator app.

Onboarding

Magic Reports is an intuitive, easy-to-use tool accessible to users of all technical abilities. Beam provides an onboarding programme to all new customers as a part of implementation, but the product works out-of-the-box, ready for use from day one.

Magic Reports implementation includes dedicated group training sessions over a mobilisation period (usually 4 weeks) and 121 support as needed. Training sessions include:

- Best practice: trainers emphasise best practice, including consent and proper setup for audio capture
- Customisation training: editing reports, using AI for refinement, correcting errors and adjusting structure and style
- Manager training: ensuring team leaders understand Magic Reports, their access rights, and ability to review team usage.

All users will be provided with a training document and video covering set-up, FAQs, and basic troubleshooting. Additional support can be requested from within Magic Reports, through the “Get Support” feature or by emailing the Service Desk.

Support

Users have access to email and telephone support from the Beam Service Desk, available 9am-5pm UK time, Monday to Friday.

The support options available to users are:

- Live Zendesk chat: integrated into Magic Notes platform, links users directly to a Beam customer support specialist via webchat, available 9am-5pm Monday to Friday
- Request 121 support session via webchat or online form
- Email support: available 9am-5pm UK time, Monday to Friday at beam@magicnotes.ai
- Online support centre: a bank of support articles available 24/7, for self service
- User guides and FAQs: these are shared during onboarding and user training, and regularly updated as product changes are made.
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