

# Service Definition Document

## **Magic Notes** Powered by **beam**

Magic Notes is a specialist AI powered transcription and summarisation platform for frontline workers.

It is created and operated by Beam, a leader in AI for the frontline, working with over 350 frontline teams. 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, reports and outputs produced by Magic Notes either directly within the output, 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. Beam is also actively working on a range of integrations.
- Users retain access to full conversation transcriptions and recordings as per their organisation's agreed retention policies.

### **Benefits of Magic Notes**

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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.
- Fully flexible templates customised to customer requirements. 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.
- Consistent, quality notes
- 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.

## 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.

Detailed support and security information is included at the end of this document.

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## Magic Notes flex

Magic Notes is a modular system. Customers have the option to purchase either core Magic Notes, or access additional optional modules through **Magic Notes Flex**.

These optional modules include **Reports**, **Talk** and **Interpret**. These modules can be enabled to support end-to-end workflows, such as housing assessments.

More details on each of these modules is below

## Reports

Reports enables users to create complex Magic Notes summaries by combining multiple inputs, from recordings to handwritten notes and video. This includes ECHPs, DoLS Assessments, Children and Families Assessments, and Best Interests Assessments. Users select the Report template which they wish to populate, then upload source files such as uploaded files, pasted text or 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.

### How it works

- Build Reports can be enabled on any Magic Notes account for all or some users
- Specific templates are built for specific use cases, for example an EHCP or DoLS
- Users upload source files. This can include combining one or several Magic Notes from recording conversations, audio files, video files, photographs and emails
- The inputted documents are then combined and formatted into the required output
- To ensure accuracy and human-in-the-loop, users are prompted to review and edit all reports, either directly within the output, or using AI via a chat interface within the tool
- There is a citations feature which can be applied per template and which provides references throughout the summary
- The Knowledge Base feature can be used to ensure the report meets statutory and organisational guidance
- Once users are happy with the summary, it can be copy & pasted into internal databases or case management systems. Beam is also actively working on a range of integrations.

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## Talk

Beam Talk is a specialist AI-powered virtual assistant designed for frontline services. It works over phone or web chat, manages inbound contact from residents or clients, collecting or sharing info as needed, and triaging effectively, reducing the pressures on front door teams and contact centres. Beam Talk is accessed via Magic Notes and is fully integrated into the core platform.

Beam Talk can be fully customised for each customer, including service information, phone call routing flow and tone of voice. Unlimited iterations are included as standard.

### How it works

- Beam Talk is a natural voice agent which provides information to callers tailored to local services, policies and processes.
- Beam Talk integrates with organisation phone lines and website chat bots, automating routine enquiries and freeing up human staff from repetitive routine enquiries.
- Beam Talk is informed by data taken from policies and processes uploaded during implementation and managed by customers.
- When customer calls are connected to Beam Talk, it gathers information (including initial pre-assessments, screening questions) and triages customers to the right place, including smart escalation of safeguarding risks and urgent risks to human staff.
- To ensure human-in-the-loop, Beam Talk creates a structured Magic Notes summary for every call, which is reviewed and logged by the required staff member.
- Beam Talk retains a recording and summary of the conversation, which is stored within the Magic Notes web application.
- Beam Talk works 24/7, in 30+ languages, over phone calls and web chat. Beam Talk can handle all calls at the same time without timing out or needing to hang up, and is able to deal with high demand volumes of calls.

### Benefits of Beam Talk

- Consistent, quality advice to customers tailored to local services, policies and processes
- Customers get the care or support they need from council services more quickly
- No missed calls or calls waiting in queues
- Human expertise and resource used effectively for calls where it is needed most

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- Detailed data capture from every call

## Onboarding

Beam provides an onboarding programme to all new customers as a part of implementation, including support to develop the data library and customising the natural voice. The implementation period is on average 8 weeks and includes:

## Pilot

- **Pre-work:** Beam can provide guidance on completing or updating your DPIA, aligning on the best service area for testing, and running initial demonstrations to key stakeholders.
- **Discovery:** get everything ready to launch live testing, including setting up key meetings, aligning on evaluation criteria and building the custom bot.
- **Initial Trial:** training the testing team and getting them set up if they do not already have Magic Notes accounts. Initial internal testing will run concurrently with phone line integration.
- **Formal Testing:** Practitioners use the tool for 4-6 weeks. The project team and practitioners meet weekly to discuss usage and feedback. Any emergency changes will be escalated and changed within 1 working day.
- **Evaluation:** collecting data and feedback from the testing team, and sharing a full report of the findings.

**Subscription Pre-work:** Beam can provide guidance on completing or updating your DPIA, aligning on the best service area for testing, and running initial demonstrations to key stakeholders.

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- **Discovery:** get everything ready to launch live testing, including setting up key meetings, aligning on evaluation criteria and building the custom bot.
- **Initial Trial:** training the testing team and getting them set up if they do not already have Magic Notes accounts. Initial internal testing will run concurrently with phone line integration.
- **Go-Live:** Beam's Account Manager supervises rollout, with initial fortnightly monitoring calls. Monitoring calls move to monthly after 3 months.

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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 Service Desk.

If customers have any serious technical issues with the bot, or any major identified issues with the service it is providing, this would be escalated immediately within Beam.

Detailed support and security information is available at the end of this document.

## Interpret

Beam Interpret is Beam’s real-time translation solution which empowers frontline staff to deliver immediate, high-quality support to clients, regardless of the language they speak. The simple, automatic detection model is purpose built for real world service delivery. Beam Interpret automatically detects speakers and languages being used. Beam Interpret is accessed via Magic Notes and is fully integrated into the core platform.

## Pilot approach

Customers can purchase 12-week pilots of Beam Interpret, which include:

- **Align** on use case/scenarios (including guardrails), languages, any safeguarding approaches
- **Train** staff on how to interact with the tool including use cases, guardrails and fallbacks
- **Test** for a minimum of 4 weeks with regular feedback sessions
- **Evaluate** usage, languages used, staff time saved, interpreter cost saved and quality of translations

Detailed support and security information is available at the end of this document.

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## Magic Notes Health Plans

Magic Notes Health Plans is an optional module available to healthcare customers, designed to support end-to-end workflows for complex clinical plans. It is accessed via the Magic Notes platform and is fully integrated into the core platform. Magic Notes Health Plans is a certified Class 1 medical device.

Health Plans is purpose-built for clinical settings where the workflow spans multiple stages and involves complex documentation requirements - for example, completing a Decision Support Tool (DST). It provides advanced AI-powered functionality to support each stage of the workflow, from preparation through to final Health Plan generation.

The Decision Support Tool is one example workflow; Health Plans can be configured to support a range of complex healthcare workflows.

### How it works

Magic Notes Health Plans can be enabled for all or a defined group of users.

### Example workflow

1. **Pre-meeting preparation:** the platform supports clinicians and teams in preparing complex structured inputs ahead of key meetings such as MDTs, drawing on existing records, uploaded source documents and prior Magic Notes to ensure the meeting is well-informed and efficient
2. **Meeting(s) recording:** the clinical meeting(s) is recorded and transcribed using the standard Magic Notes recording functionality, capturing all contributors and discussion
3. **Plan generation:** following the meeting(s), Magic Notes Health Plan incorporates the recording(s) transcript(s) and any additional supporting source materials to draft the Health Plan in full - structured to the required template and formatted for review
  - To ensure accuracy and human-in-the-loop, clinicians are prompted to review and edit all outputs, either directly or using AI via the chat interface within the tool. There is a citations feature which provides references throughout the plan

### Benefits of Magic Notes Health Plans

- Reduces the administrative burden of complex, multi-stage clinical documentation, freeing up clinician time
- Supports consistent, high-quality outputs aligned to statutory and organisational requirements
- Enables a smooth, structured end-to-end workflow - from preparation to meeting(s) capture to final plan - within a single platform
- Reduces duplication of effort across the stages of a complex clinical process
- Increases accuracy and completeness of clinical plans by drawing on all relevant inputs

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## End to end workflows

Beam modules can be combined to power end to end workflows. Customers with a Magic Notes Flex subscription can flexibly use credits to combine modules. Additional optional modules can be enabled at any time by contacting Beam support. Customisation support will be provided.

### Example workflow: Beam Assess

Beam Assess is a unique combination of the above tools, specifically to support the end-to-end resident housing journey.

The combination enables streamlining housing triage and homelessness assessments and retaining full human oversight and statutory accountability. That starts from the very first point of contact via Beam Talk, handling inbound calls/messages - through to summarising assessments and follow-up conversations using Magic Notes, and ultimately supporting the creation of statutory documents such as Personal Housing Plans using Build Reports. Beam Assess is designed to capture structured information at first contact, supports document collection, generates detailed summaries and reports, and standardises questioning.

### How it works

#### 1. Triage:

The first stage of the resident journey focuses on triage. Beam Talk manages initial calls/presentations at the front door in almost any language, helping to resolve lower-complexity queries quickly, escalate urgent cases appropriately, and ensure residents who need to speak with an officer are connected to one. It also gathers key information upfront and provides residents with accurate, relevant information all tailored to the council's policies and signposting options. Beam Talk can accurately, live translate into 72 languages to meet the callers needs, and is available 24/7.

#### 2. Summarisation:

During the second stage of the resident journey, housing teams use the Notes tool to record conversations and assessments - whether it's a quick follow up call or a full assessment, whether conducted online or face-to-face - and instantly generate structured, compliant outputs that match the local authority requirements. These templates are customised from scratch to match exactly how the local authority requires documentation to be formatted and recorded, even down to the appropriate tone.

#### 3. Consolidation:

The final stage consolidates information from the initial triage call, the first assessment, all follow-up interactions, and supporting documents such as ID or bank statements (which Beam's AI tools can follow up on when prompted). Together, this creates a complete case

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record, ready to support statutory documentation, including the Personal Housing Plan. This is the first draft to be reviewed and refined by the housing caseworker, freeing up time for the person centred work and decision-making.

## Pilot approach

Customers can purchase 12-week pilots of Beam Assess, which include:

- **Access to all relevant modules under the Magic Notes Flex package**
- **Discovery** session to tailor Beam Assess to your unique process and knowledge base
- **Training** staff on how to interact with the tool including use cases, guardrails and fallbacks
- **Trial** for 1-2 weeks to embed Beam Assess into existing phone lines and processes.
- **Pilot** to include weekly meetings to discuss usage, feedback and iterate the process.
- **Evaluate** collecting data and feedback from the testing team, and sharing a full report of the findings.

Detailed support and security information is available at the end of this document.

## Support - all Beam products (any package, all modules)

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 chat: integrated into Magic Notes platform, links users directly to a Beam customer support specialist via webchat, available 9am-5pm Monday to Friday
- Unlimited 121 support sessions, requested via webchat, email, online form or via Account Manager
- Email support: available 9am-5pm UK time, Monday to Friday at [beam@magicnotes.ai](mailto: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

## 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

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the foundations of Beam's AI product suite 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.