

Service Definition Document

Beam Tools for Frontline Workers

Beam supports over 200 UK Local Authorities, NHS, and public sector organisations. Our highly customisable AI suite features Beam Notes, Build and Plan for assessments and note-taking, Beam Talk for contact centre service and triage, and Beam Interpret for real-time translation. These tools streamline workflows, enable frontline staff to focus on person-centered care, and significantly reduce administrative burdens.

Beam's tools are highly customisable to address each customer's unique workflows, reporting requirements and service provision.

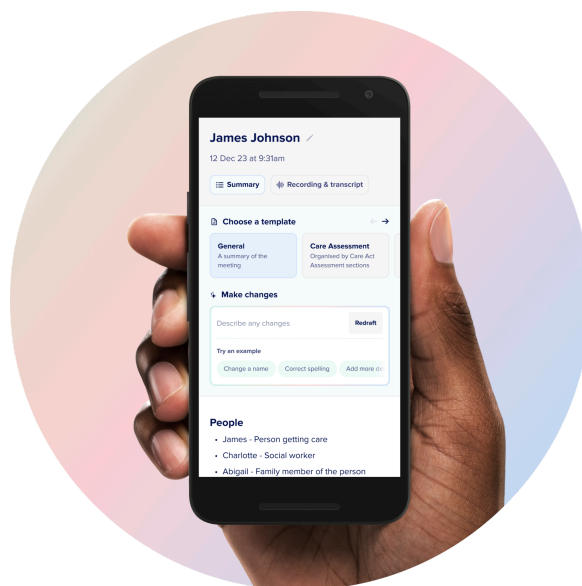
Beam's suite of AI tools comprises:

(1) Beam Notes: recording, transcription and summarisation of frontline conversations to create detailed casenotes including a **(2) Build** feature which allows users to create detailed reports in minutes from customer uploaded reference documents

(3) Beam Plan: a customised workflow assistant that guides users through complex, multi-stage pathways and assessments

(4) Beam Talk: a flexible voice and web chatbot, supporting triage, information gathering and client/service user engagement

(5) Beam Interpret: live translation of conversations into/from 45+ languages



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1. Beam Notes

Beam Notes is a specialist tool for frontline workers to instantly create detailed case notes, meeting notes and assessments. It is created and operated by Beam, a leader in AI for the frontline, who work with over 350 frontline teams from social care, NHS and the voluntary / charity sector. Beam Notes has been developed in collaboration with Beam's own team of frontline caseworkers and is designed to suit the unique workflows of frontline and clinical workers.

1.1 How It Works

The key steps in how Beam Notes operates include:

- Beam 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 Beam Notes to record conversations. Beam Notes can work with different speakers, languages and accents.
- Once the conversation is complete, or a recording is uploaded, Beam 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.
- Where additional context or professional judgement was not captured in the original recording, frontline workers can use Add Audio to incorporate it into the draft. Add Audio can also combine information captured across multiple sittings into one assessment.
- To ensure accuracy and human-in-the-loop, users are prompted to review and edit all summaries produced by Beam 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.
- For clinical workflows, generate automatic medical code recommendations for SNOMED-UK. Confirm, replace or manually add codes.
- Once users are happy with the note, it can be moved into the case management system or EPR automatically via a range of integration options, or manually via copy and paste, depending on customer preference. Any note can also be exported as a word document or PDF.

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- Users retain access to full conversation transcriptions and recordings as per their organisation's agreed retention policies.

1.2 Benefits of Beam Notes

Beam Notes allows users to rapidly produce case notes including clinical assessments and social care assessments without compromising on quality.

Key features and benefits of Beam Notes include:

- Saves frontline staff and clinicians up to a day weekly (averaging 8 hours saved per week).
- Enabling caseworkers to be more present during assessments by not having to focus on note taking.
- Templates are quality assured during the development process to ensure compliance with different reporting requirements, e.g. CQC (Care Quality Commission).
- Increased accuracy in capturing all conversation details.
- Captures conversations securely using ambient voice technology (AVT) with offline functionality to capture meetings anywhere.
- Generates summaries, SNOMED coding, letters, and records in approved formats, accelerating turnaround times.

1.3 Onboarding

Beam 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.

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

The onboarding training programme covers the following elements:

- **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

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- **Manager training:** ensuring team leaders understand Beam 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 1:1 support can be requested at any time through the "Get Support" feature or by emailing the Service Desk.

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

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2. Beam Build

Beam Build is a feature within Beam Notes that allows you to create high quality reports in minutes by combining various source materials such as documents, recordings and notes. Report templates are fully customised and designed for frontline and statutory reports.

2.1 How It Works

The core workflow for using Beam Build includes:

- Beam Build 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 Children and Families Assessments, DoLS 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 Beam 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 Beam 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 moved into the case management system or EPR automatically via a range of integration options, or manually via copy and paste, depending on customer preference. Any note can also be exported as a word document or PDF.
- 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 real-world workflow of plans and assessments.

2.2 Benefits of Beam Build

Key features and operational benefits of Beam Build include:

- 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

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2.3 Onboarding

Beam Build is part of Beam Notes so mobilisation happens in parallel. It 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.

Beam Build implementation includes dedicated group training sessions over a mobilisation period (usually 4 weeks) and 121 support as needed.

Implementation training for Beam Build includes the following components:

- 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 Beam 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 1:1 support can be requested at any time through the "Get Support" feature or by emailing the Service Desk.

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3. Beam Plan

Beam Plan is an AI-powered workflow assistant for complex, multi-stage frontline assessments. Built for evidence-heavy, risk-assessed work that standard AI tools are not designed to handle, Beam Plan wraps around the entire documentation process from initial evidence upload to final submission. It guides practitioners and clinicians through the workflow, synthesising multiple streams of evidence, identifying evidence gaps and contradictions between sources,, and producing structured outputs for review.

Common implementation scenarios for Beam Plan include:

- Continuing Healthcare Assessments such as DSTs (Decision Support Tools), Reviews, PUPoC (Previously Unassessed Period of Care), Appeals
- EHCPs (Education, Health and Care Plans)

3.1 How It Works

The Beam Plan process consists of the following key steps:

- Users upload evidence from multiple sources such as case files, eligibility applications, verification documents, GP records, support plans, family views, interview transcripts, MDT recordings, and prior applications. There is no limit to the number of source files uploaded.
- Beam Plan automatically classifies each document, identifies evidence gaps, and creates tasks to ensure all requirements are met before progressing.
- Workflows feature stage-gating, ensuring practitioners advance only when required evidence is in place, while maintaining user discretion to skip when appropriate.
- The system researches across uploaded documents, generating structured domain summaries where every field is linked back to its source for full auditability. Any contradictions are flagged to the user for resolution.
- Users can add more sources over time, with every change made by AI auditable to the user to ensure they are comfortable to approve and incorporate it into the final output.
- Review meetings (such as MDTs, panel hearings, or interviews) can be included as dedicated stages to be automatically transcribed and summarised.
- All generated content is 100% editable by practitioners, with edits preserved.
- Once users are happy with the Beam Plan, it can be moved into the case management system or EPR automatically via a range of integration options, or manually via copy and paste, depending on customer preference. Any note can also be exported as a (custom) word document or PDF.

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3.2 Benefits of Beam Plan

Key advantages and capabilities of Beam Plan include:

- Identifies missing evidence and flags contradictions between different sources upfront.
- Enforces stage-gating to prevent premature progress while allowing practitioner discretion.
- Synthesises multiple evidence streams rather than relying on a single conversation.
- Provides source attribution for every summary field, ensuring full traceability.
- Offers 100% editability with edits preserved throughout the entire workflow lifecycle.
- Integrates review meetings via automated classification, transcription, and summarisation.
- Provides auditability of AI changes, allowing users to review conflicts and changes for approval.
- Supports flexible export formats and dedicated integrations into existing systems of record.
- Reduces the risk of missed steps or deadlines in complex, multi-stage processes.
- Gives managers real-time visibility of where cases sit across a caseload.
- Brings consistency to how staff work through pathways, regardless of experience level.
- Connects with other Beam tools including Beam Notes so information isn't duplicated across steps.

3.3 Unique Differentiators

Beam Plan is distinguished by the following key features:

- **Configurable stage by stage:** Each stage reflects exact practitioner requirements rather than a fixed template.
- **Built for long-running workflows:** Evidence can be added over time while preserving user edits.
- **Reasoning over summarisation:** Classifies and researches evidence upfront to enable features like contradiction detection.
- **Traceable by design:** Every claim connects to its source and every AI edit is flagged for auditability and human review.
- **Rapid configuration:** New workflows can go live in days through forward-deployed engineering.

3.5 Onboarding

Beam Plan is configured to reflect each organisation's specific pathways and processes as part of onboarding.

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The onboarding and setup process covers the following phases:

- Mapping existing pathways and processes with the customer to configure the workflow.
- Group training sessions covering how to use Beam Plan day-to-day, alongside 121 support as needed.
- Manager training on pathway configuration, caseload visibility and reporting.

All users will be provided with a training document and video covering set-up, FAQs, and basic troubleshooting. Additional 1:1 support can be requested at any time through the "Get Support" feature or by emailing the Service Desk.

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4. Beam Talk

Beam Talk is an AI virtual assistant for local government, the NHS, and public sector teams. Operating via phone and web chat, it handles inbound and outbound resident, patient, and client contact including gathering information, triaging, and escalating cases to reduce contact centre pressure.

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.

4.1 How It Works

The main operational steps of Beam Talk include:

- Beam Talk is a natural voice agent that provides information to callers tailored to relevant 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.
- Beam Talk supports 'warm transfer' where, when a call is transferred to a human, they will receive a short summary note from the agent conversation, and the transferred call will continue being recorded to ensure continuity.
- To ensure human-in-the-loop, Beam Talk creates a structured Beam Notes summary for every call, which is reviewed and actioned. As desired, the user can move the note into the case management system or EPR automatically via a range of integration options, or manually via copy and paste, depending on customer preference. Any note can also be exported as a word document or PDF.
- Beam Talk retains a recording and summary of the conversation, which is stored within the Beam Notes web application.
- Beam Talk operates 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.
- Conducts proactive outbound calls without extra headcount - handling waiting list check-ins, annual reviews, and care assessments, then delivering triaged, auto-tagged summaries for practitioner action.

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- Sends SMS conversation summaries to consenting callers.

4.2 Benefits of Beam Talk

Key advantages of implementing Beam Talk include:

- Consistent, quality advice to customers tailored to local services, policies and processes
- Risk management and awareness through AI-enabled safeguarding
- Customers get the care or support they need from services more quickly
- No missed calls or calls waiting in queues
- Human expertise and resource used effectively for calls where it is needed most
- Detailed data capture from every call
- Handles routine contact to reduce cost per interaction.

4.3 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.

The standard implementation rollout involves the following phases:

- **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 Beam 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.

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 Beam 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.

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4.4 Beam Talk Pilots

Alternatively, a structured pilot process can be followed, which includes the following steps:

- **Pre-work:** Beam will align on the best service area for testing, and run 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. Initial internal testing will run concurrently with phone line integration.
- **Formal Testing:** Beam Talk will be made live in a staggered way over 4-6 weeks. The project team and operational teams will meet weekly to test, discuss usage and review 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.

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5. Beam Interpret

Beam Interpret is Beam's AI live real-time translation tool. Our real-time translation solution empowers frontline staff to deliver immediate, high-quality support to clients, regardless of the language they speak. The simple, push to talk model is purpose built for real world service delivery.

5.1 How It Works

The key features of how Beam Interpret operates include:

- Beam Interpret provides real-time spoken interpretation and an on-screen written transcript during live in-person or remote conversations.
- It automatically detects the spoken language and translates dialogue to enable natural two-way communication across 45+ verified languages and dialects evaluated for accuracy and quality by an independent language services provider.
- Once the conversation finishes, a full bilingual transcript and summary are made available within Beam Notes for review and record-keeping.

5.2 Benefits of Beam Interpret

Key benefits of using Beam Interpret include:

- Eliminates language barriers and expands access for non-English speaking clients.
- Reduces interpretation costs by 50% to 70% compared to booking human interpreters.
- Provides instant on-demand availability without needing to schedule third-party interpreters.
- High quality translation validated to a 96%+ LQA accuracy score with no major errors.

5.3 Onboarding

Beam Interpret works out-of-the-box via web browsers and mobile devices, requiring minimal setup. Onboarding for pilot and enterprise deployments includes setup support, guardrail alignment, and staff training on best practices and fallback procedures.

Pilot and onboarding programs for Beam Interpret consist of four core stages:

- **Align** on use case/scenarios (including guardrails), languages, any safeguarding approaches

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- **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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6. Onboarding, Implementation and Training

6.1 Onboarding

Beam is designed to work out of the box from day one. Implementation exists to configure templates and pathways to local practice, to satisfy information governance, and to build practitioner confidence.

Phase	Timing	Activity
1. Mobilisation and governance	Weeks 1-2	Kick-off, governance structure, DPIA support, security, IG sign-off and clinical safety (where appropriate), success measures agreed
2. Configuration and discovery	Weeks 3-4	Template and pathway configuration, SSO set-up, Talk knowledge base build
3. Training and initial use	Weeks 5-8	Role-based training, initial live use, weekly feedback loop
4. Rollout and evaluation	Weeks 9-12+	Full deployment, transition to steady-state account management, impact evaluation

6.2 Pilot and Proof-of-Value Options

Beam supports time-boxed pilots where a buyer wants to establish value before committing to a full deployment. These can vary slightly by product, but each follow a consistent structure:

Stage	Standard pilot phase
Align	DPIA guidance, agree the service area for testing, stakeholder demonstrations, evaluation criteria, custom use case build (e.g. agent, customer-specific guardrails, template build)
Train	Train the testing team, set up accounts, run internal testing (alongside phone line integration for Talk pilots)

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Test	Practitioners use the service for four to six weeks, with weekly project team and practitioner sessions; required changes to the customisation are escalated and made within one working day
Evaluate	Data and feedback collected from the testing team; full findings report shared

6.3 Unlimited Training

All training and adoption support is included in implementation at no additional cost and is delivered as facilitated group sessions with 1:1 support as required.

Training sessions are tailored by role and cover the following areas:

- **Best practice** - consent, appropriate use, and correct set-up for audio capture.
- **Practical use** - logging in, recording, pause, resume and save, and selecting the correct meeting type or template for an accurate output.
- **Customisation** - editing summaries and reports, using AI-assisted refinement, correcting errors, and adjusting structure and style.
- **Manager training** - access rights, caseload visibility, reviewing team usage, manager analytics, and - where relevant - product configuration / governance.

All users receive written guidance and video training covering set-up, FAQs and basic troubleshooting. Group and refresher sessions remain available throughout the contract term, as do unlimited 1:1 sessions, and materials are updated as the product changes.

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7. Unlimited Support Options

Support covers all modules - Notes, Build, Plan, Talk and Interpret - and is included in the subscription at no additional cost.

Channel	Availability	Detail
Live chat	09:00–17:00 UK, Mon–Fri	Integrated into the application and connects the user directly to a Beam customer support specialist
Dara, AI Support Agent	24/7	Dara is our intelligent AI agent, delivering instant support, answers, and guidance for all users.
Email	09:00–17:00 UK, Mon–Fri	Email support@beam.org
In-application request	24/7 submission	Directly inside the product interface, users can click the "Get Support" button (located on the homepage or navigation menu) to submit a ticket or support request
Online support centre	24/7	Self-service article library, continuously updated
1:1 support sessions	Unlimited	Requested via chat, email, online form or the account manager
Group and refresher training	Ongoing	Available throughout the contract term
Named account manager	Contract term	Fortnightly monitoring calls for the first three months, monthly thereafter

8. Information Security, Data Protection and Compliance

With over eight years of experience working alongside the NHS, government bodies, and the voluntary sector, Beam brings deep expertise in managing special category data. We build robust security and data protection measures directly into every level of our AI product suite.

Key security, privacy, and compliance provisions 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.
- Compliant with NHS DSPT (Data Security and Protection Toolkit) with a standards exceeded rating, alongside DTAC compliant, and holding ISO 27001 and Cyber Essentials Plus.
- Beam Platform and associated tools are registered as a Class I Medical Device.
- Beam has appointed a Clinical Safety Officer (CSO) who oversees Beam's entire clinical risk management process. Beam maintains full compliance with the DCB0129 clinical safety standard and we can provide the relevant Clinical Safety Case Report; Clinical Risk Management Plan and Hazard Logs upon request.
- 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 Beam 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.
- Data Encryption and Security Standards: All data in transit is encrypted using TLS 1.3, and data at rest is encrypted using AES-256. Regular third-party penetration testing is performed to maintain security integrity.
- Role-Based Access Control (RBAC): Strict permission models ensure that caseworkers, managers, and administrators have granular, role-appropriate access to data.

Full details of our security posture are available on: <https://trust.beam.org/>