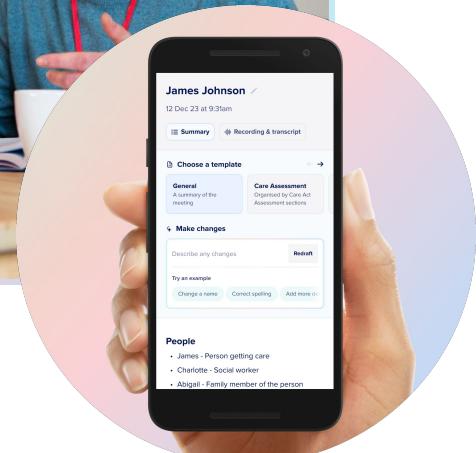
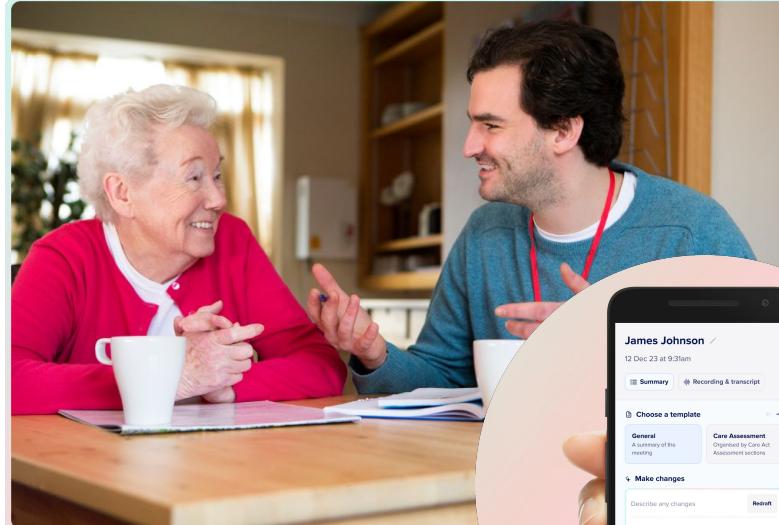


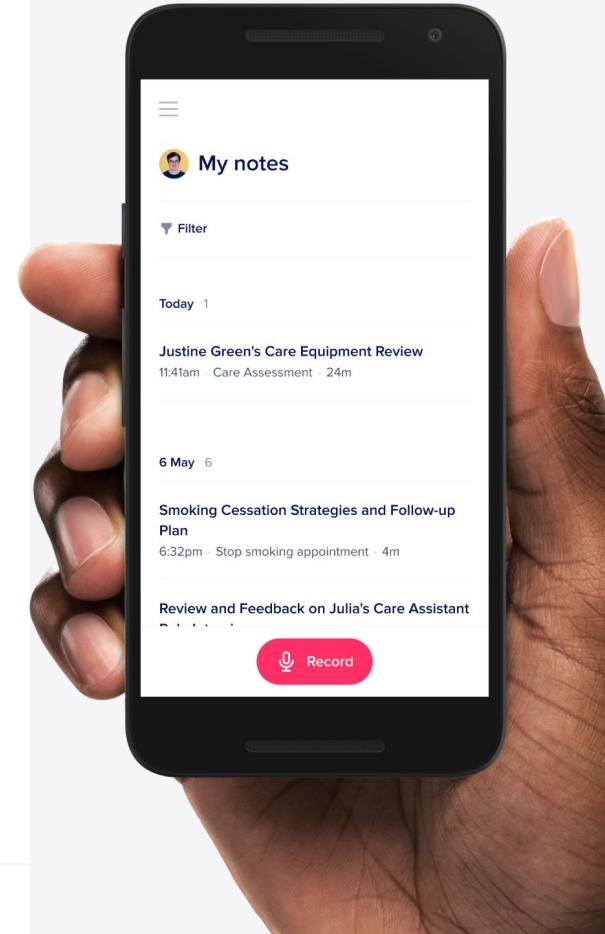


Introduction to Magic Notes



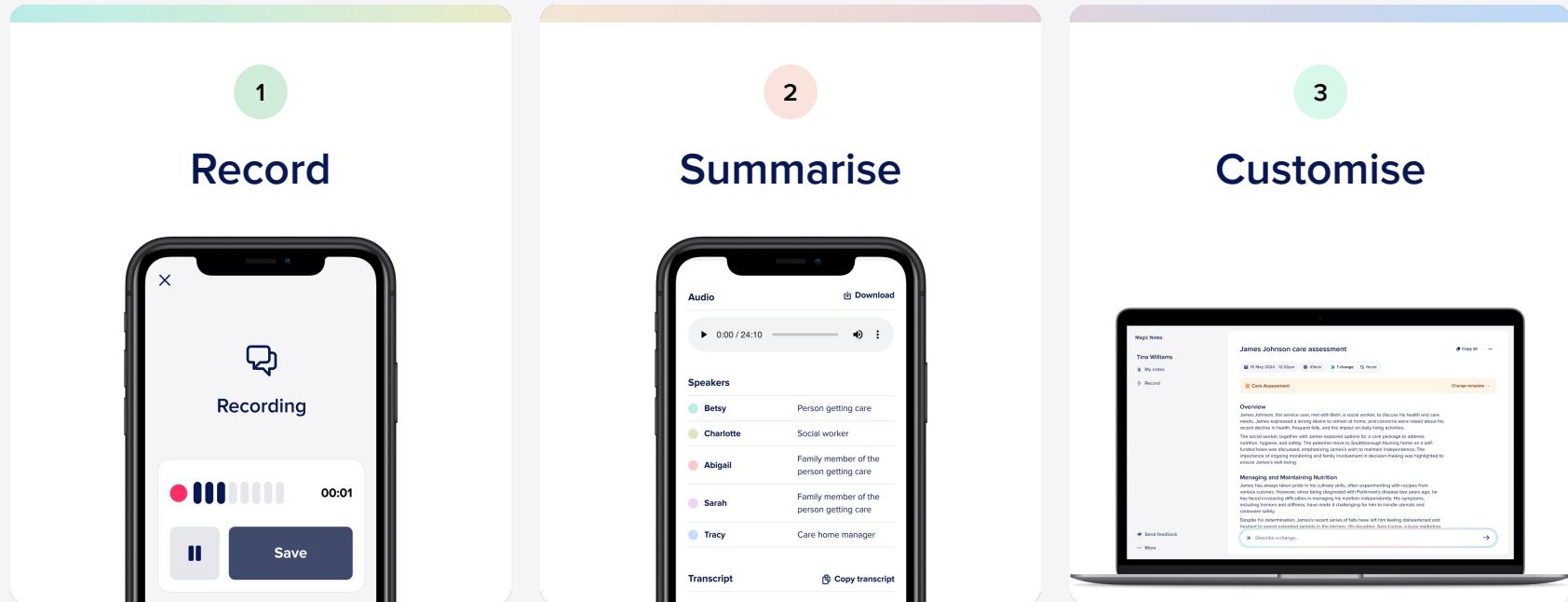
By the end of today you will...

1. Feel confident **using Magic Notes as part of your practice**
2. Know how to **log in and make a recording** in Magic Notes
3. Understand how to **customise your Magic Notes**



What is Magic Notes?

An AI-powered meeting summary tool



The image displays three mobile devices illustrating the Magic Notes process:

- Record:** An iPhone showing a recording interface with a microphone icon, the word "Recording", a progress bar at 00:01, and a "Save" button.
- Summarise:** An iPhone showing a summary interface with a transcript and a list of speakers: Betsy (Person getting care), Charlotte (Social worker), Abigail (Family member of the person getting care), Sarah (Family member of the person getting care), and Tracy (Care home manager).
- Customise:** A laptop displaying a detailed meeting summary for "James Johnson care assessment" on May 24, 2024. The summary includes sections on "Core Assessment" and "Meeting and Monitoring Nutrition".



Magic Notes creates a strong 1st draft within minutes, but it's **your expertise** that refines it.

Findings so far



Reducing Admin

Each person gets 60% of their time back each week



Consistency and higher quality

Detailed notes developed immediately



Increased connection

Frontline staff can focus more on support

*“It took me **minutes** to edit my report when it usually takes up to an hour to write it up”*

FAQs

What meetings can I use it for?

Any professional conversations that require written notes 

Do I need to get permission?

Yes, you need permission from those present to record. We'll cover this in training!

Is it safe to record personal data?

Magic Notes processes data securely and the AI does not retain any data 

Do I need an internet connection?

No! Magic Notes is accessed via a web browser but you will be able to record without internet 

Getting consent - how you could say this:

Option 1: Focus on Listening

“To make sure I can give you my full attention today, I use a tool called *Magic Notes*. It’s a note taking tool that turns our conversation into notes for me, so I’m not scribbling while you’re speaking. Everything is completely secure. Is it okay if I use it while we talk?”

Option 3: Friendly and Simple

“I use something called *Magic Notes* that helps me write up my notes accurately after our conversation. It means I can concentrate on you, not my notepad. Are you comfortable with that?”

Option 2: Practical and Reassuring

“Would it be alright if I use a bit of helpful technology called *Magic Notes*? It’s a note taking tool that turns our conversation into notes for me so I don’t miss anything, and helps get your care arranged more quickly if we need to. Your privacy is fully protected, and I can explain more if you’d like.”

Option 4: Empathetic and Supportive

“I want to be fully present with you and not distracted by writing everything down. *Magic Notes* is a note taking tool that creates clear notes afterwards. It also helps move things along more quickly if care is needed. Would you be happy for me to use it?”

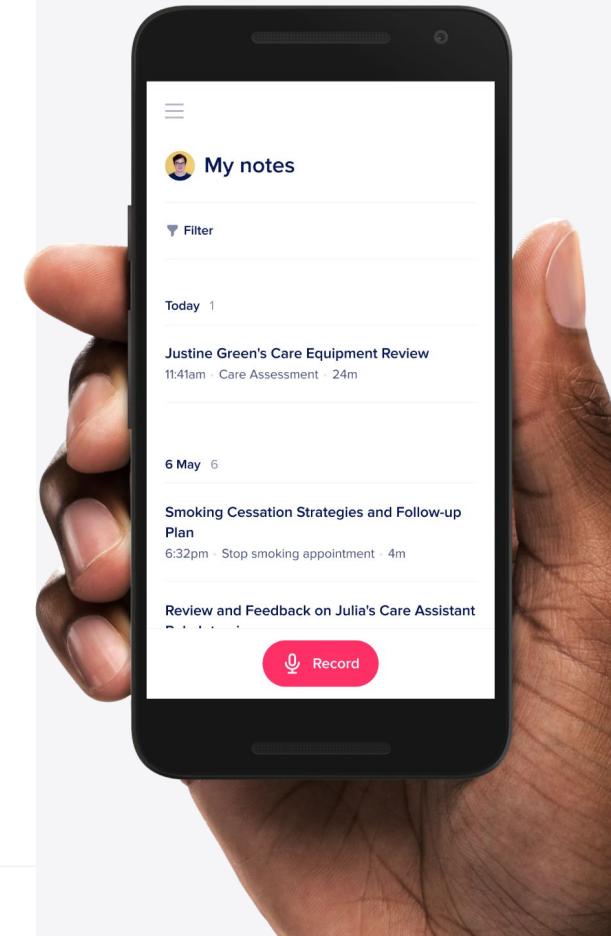


SUGGESTION: If consent is not given - take written notes as normal and record yourself reading those notes after the session.

Accessing Magic Notes

Open the **Google Chrome** or **Microsoft Edge** web browser app on your phone and enter the following URL

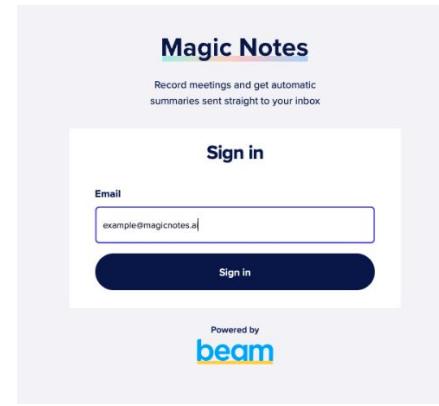
magicnotes.ai



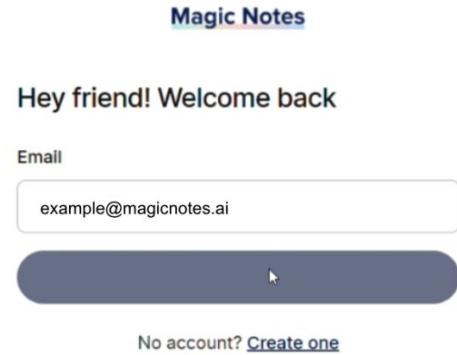
How to login to Magic Notes



Tap the “Sign in” icon

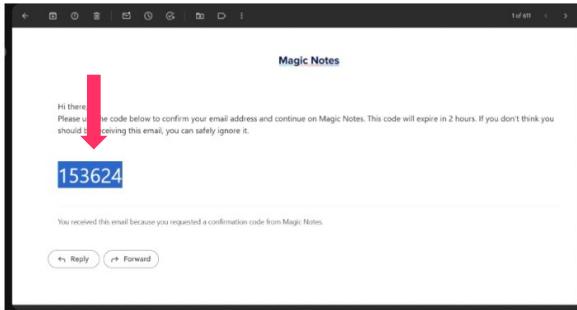


Enter your work email address



Enter your work email address again

📱 In some cases - you may be required to input a 6-digit code sent to your email



Check your inbox and
copy your code

Magic Notes

Check your inbox
Enter the code we just sent to c*****@h*****.com

Code

153624 I

Continue

Didn't receive a code? Resend code

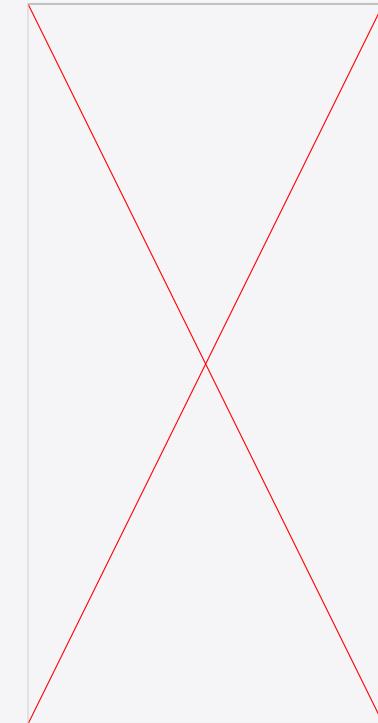
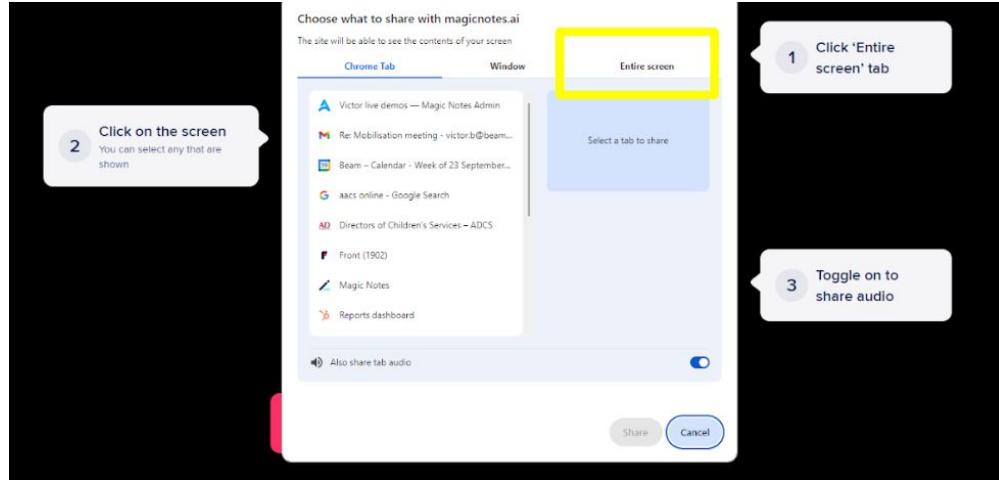
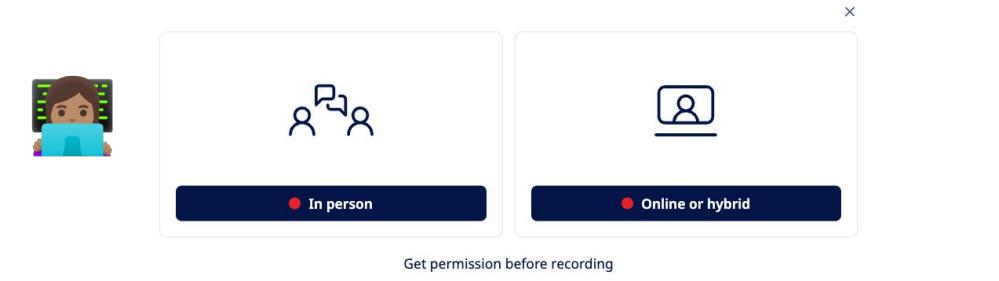
Enter your code on the Magic Notes
page

Note: if your organisation uses single sign on,
this will be different.



NOTE: Be sure to check your 'other' and junk folder. Contact beam@magicnotes.ai for support.

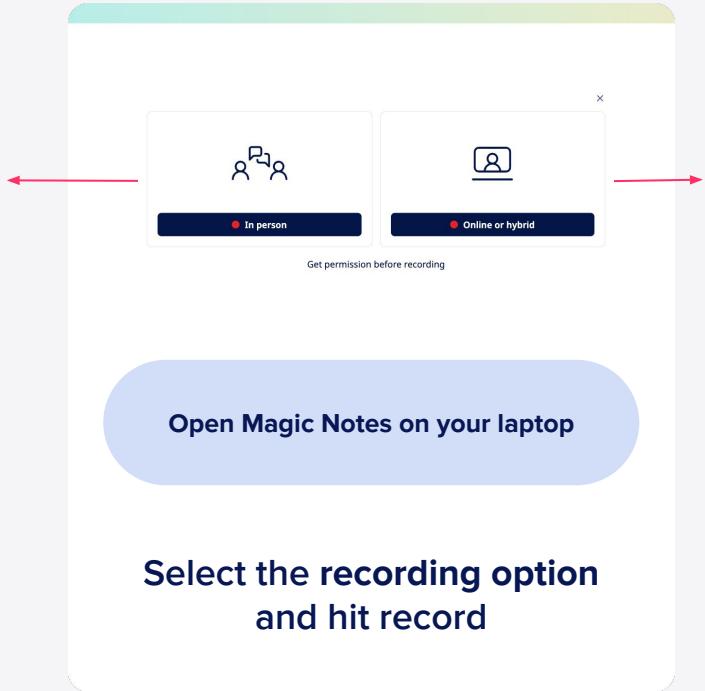
How to make a recording



Making a recording from your laptop/desktop



If everyone speaking is in the room



If anyone is speaking from your desktop

Recording an Online Meeting (Instructions will appear on your screen like below)



Choose what to share with magicnotes.ai

The site will be able to see the contents of your screen

Chrome Tab

Window

Entire screen



Screen 1



Screen 2

Also share system audio



Share

Cancel

3

Click on the screen

You can select any that are shown

2

Click 'Entire Screen' tab

4

Toggle on to 'share audio'

5

Click 'share'

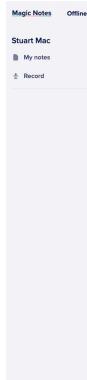
You can now make a Magic Notes recording without internet access!



Ready to upload

Reopen Magic Notes on this device when
you're back online to upload it

OK



Upload pending

Come back when you're online to upload 1 recording.

Today at 16:02

Upload pending



Use the same website on
your normal browser.

magicnotes.ai

Once you've made a
recording, the summary will
generate later, when you
have signal again.

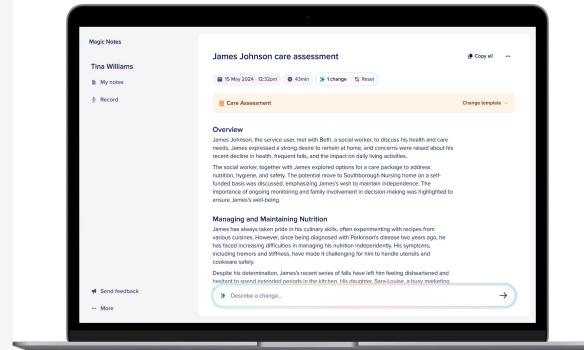
Accessing Magic Notes

Phone 📱 - stay on the Magic Notes page & do not lock your phone



Larger Meetings: Boost audio quality with an external microphone

Laptop💻 - you can switch between tabs ⚡

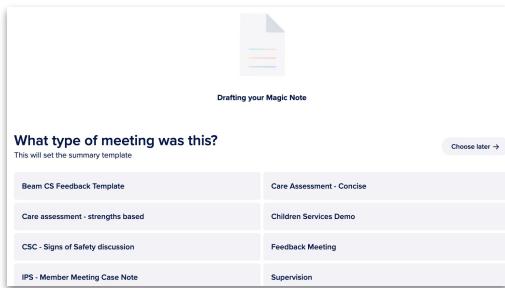


Edit your Magic Note on your laptop

3 Understand how to **customise** your Magic Notes

1 Choose your template when you have finished recording.

- Choose the best fit template or the generic 'General Meeting'
- Change this later if you want



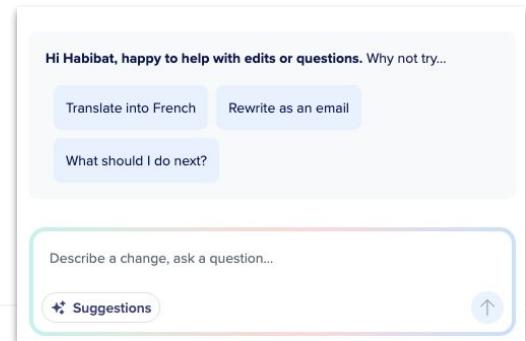
2 Directly edit your summary, just like you would on a document

- Fix any small spelling errors
- Quickly delete sections you don't want



3 Ask Magic Notes to make changes for you using the 'chat'

- Correct spelling errors or incorrect names
- Add or remove details
- Change the structure, style or format
- Use the 'Suggestions' button to help you edit your Magic Note!



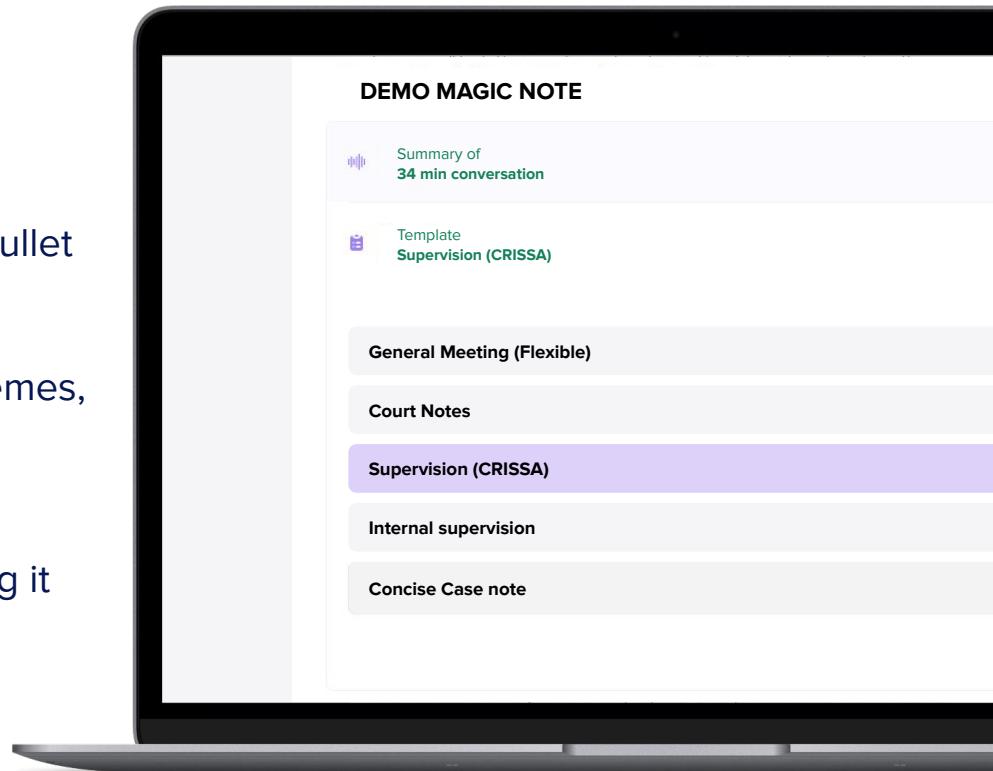
How do ‘Templates’ work?

Templates basically ‘tell’ your Magic Note:

- What headings & sections to use
- How much detail to use (long vs. short)
- What language style and formatting to use (bullet points vs. prose)

→ **General Summary** – Adapts to conversation themes, automatically organising key topics

→ **Custom Templates** – We worked with your colleagues to match internal report formats, making it easier for Magic notes to know what’s important.





Chat with your Magic Notes

Chat is our new interface for interacting with your Magic Notes. Get quick details, make changes or create new outputs - all from a single chat window.

Try asking...

Who was present in the meeting?

What medications were mentioned?

Send a summary in the form of a doctor's letter

Change the spelling of Micheal to Michael

Did Samantha give her daughter's age?

Chat can...



Answer questions about content in your Magic Note

Clarify, expand or summarise information

Reformat, translate or rewrite the summary

Collate information in the Magic Note - like actions or conclusions

What Chat *is* and *isn't*

Chat can...



Answer questions about content in your Magic Note

Clarify, expand or summarise information

Reformat, translate or rewrite the summary

Collate information in the Magic Note - like actions or conclusions

Chat cannot...



Answer questions beyond what's in the transcripts, summary, or conversation history

Speculate, infer or make judgements - that's up to the practitioner

Access external information or research that's not in the Magic Note



Add More to your Magic Note

💡 At the end of a meeting, you may want **to add other details about your visit:**

- Observations you made that you felt were **not appropriate to be noted** in front of the other people in the recording.
- Things you may have **remembered after the meeting.**

 Add more

JJ - Housing Assessment (Demo Call)

Summary of 2 recordings

Template General Meeting

Attendees



What will my Commentary look like?

Introduction and Current Situation

Janita is currently experiencing a stressful period due to an impending move from their property. They have been residing in the property for the past two years and received an eviction notice from the landlord two weeks ago. This sudden requirement to relocate has added to Janita's stress levels. Following the meeting, Stuart noted that the property had not been reviewed by the landlord recently, with issues such as damp, severe cracks in the plaster, and poor heating. These concerns could impact Janita's health and will need to be addressed in future support efforts.

Changes Made: Will be identified as being 'after meeting'.

Changed Your Mind?: Click the red bin to delete that comment.

The screenshot shows a digital interface for a call summary. At the top, it says "JJ - Housing Assessment (Demo Call)". Below that is a summary of two recordings: "09 Apr 25 at 11:12am • 5 min" and "15 Apr 25 at 3:35pm • 32 sec". Each recording has a delete icon. Underneath the recordings is a "Template" section labeled "General Meeting". The "Attendees" section lists "Stuart - Social Worker" and "Janita - member". At the bottom, there is an "Overview" section with a "Add more" button and a red bin icon for deleting comments. The bottom right corner shows the magicnotes.ai logo and a copyright notice.

Recap: How to use Magic Notes for visits



Introduce Magic Notes

Ensure everyone in the room is happy to be recorded



Record using your phone

Hit 'Record' to start, and hit 'Save' when you're done

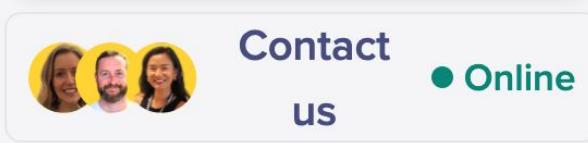


Login from your Laptop later

For a proper review and to make edits as needed before submission

How to get in touch with us

- Start live chat
- Book one to one training



- Email us at beam@magicnotes.ai
- Leave feedback using the star rating at the bottom of your summaries

A white rounded rectangular card with a thin gray border. At the top right is a small "Copy all" button with a clipboard icon. In the top center are five yellow stars. Below the stars is the text "What could we have done better?". Underneath that is a text input box containing the text "Captured all the details really well, actions could be better if bullet pointed!". At the bottom left is a note: "Please note feedback will be collated and used for product improvement and research. Please do not include any sensitive information." At the bottom right is a teal "Submit" button.

Tip Adding to Home Screen

All others

 Analytics

Janita Jayapiragas

 My notes

 Record

 Create report

 Folders

 Manage Users

 Help Centre

... More

Magic Notes can be made to look like an App Shortcut on your devices.

This step-by-step guide in the Help Centre will show you how to do this:

Computer: [CLICK HERE](#)

Phone: [CLICK HERE](#)



What happens next?

 Task: **Make at least 3 Magic Notes recordings this week**

 Remember to rate the quality of each summary and share written feedback

 We will use your feedback to keep improving Magic Notes

