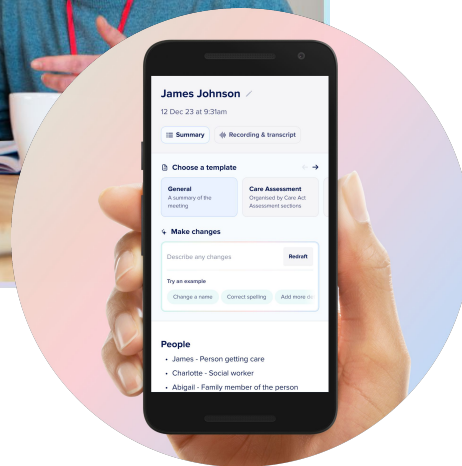
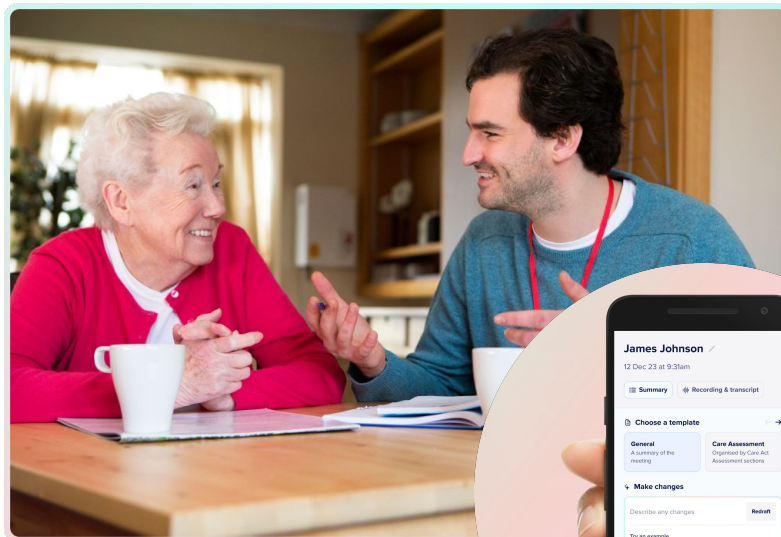


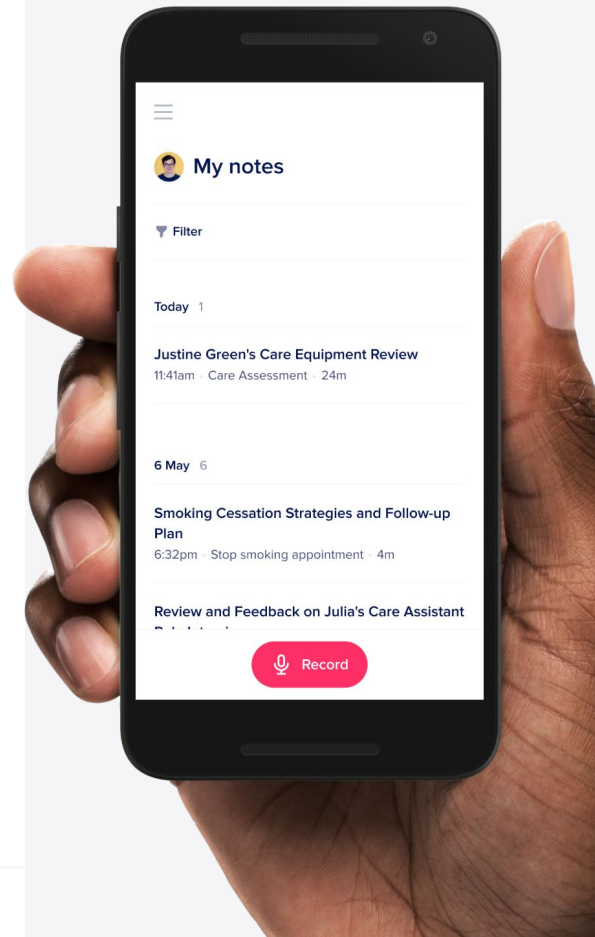


Introduction to Magic Notes



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**

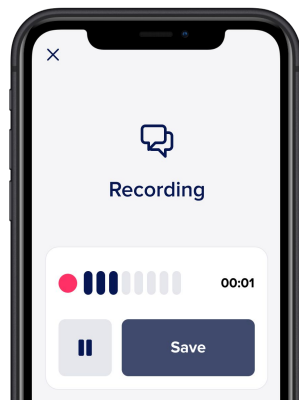


What is Magic Notes?

An AI-powered meeting summary tool

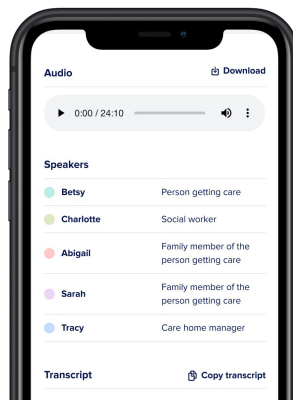
1

Record



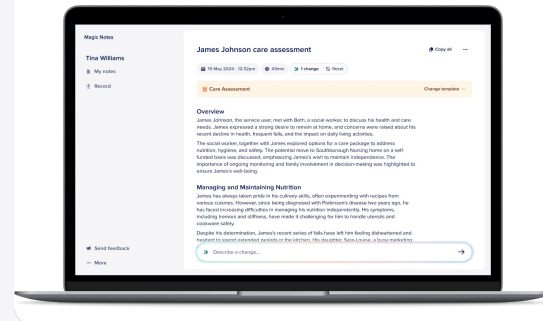
2

Summarise



3

Customise



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 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 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 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?”

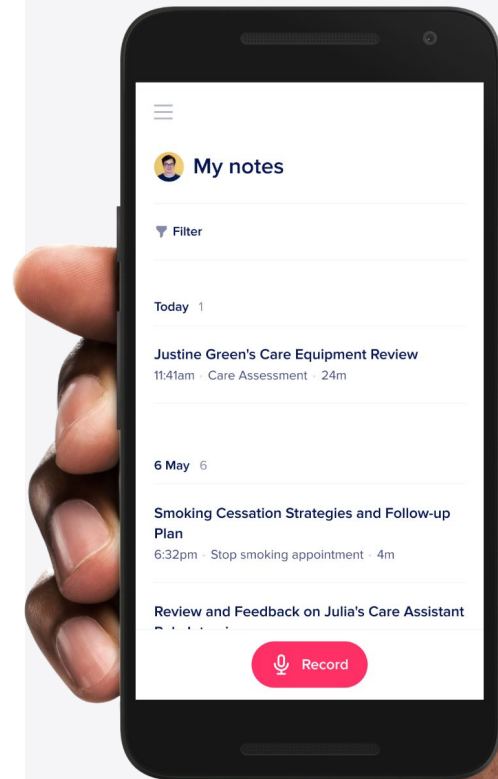


SUGGESTION: If consent is not given - take written notes as normal and record yourself reading those notes after the session.

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

Magic Notes

Powered by beam



Transform social workers' productivity with AI

Just hit record and let Beam's cutting-edge AI automatically generate detailed assessments customised for your teams

[Find out more](#)

Sign in

Magic Notes

Record meetings and get automatic summaries sent straight to your inbox

Sign in

Email

example@magicnotes.ai

Sign in

Powered by

beam

Magic Notes

Hey friend! Welcome back

Email

example@magicnotes.ai

No account? [Create one](#)

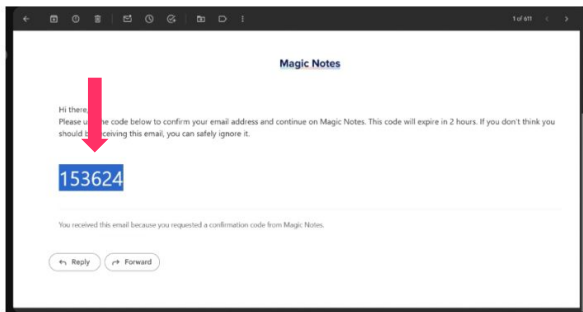
Tap the “Sign in” icon

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

Continue

[Didn't receive a code? Resend code](#)

Enter your code on the Magic Notes
page


Note: if your organisations 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




In person


Online or hybrid

Get permission before recording

2 Click on the screen
You can select any that are shown

Choose what to share with magicnotes.ai
The site will be able to see the contents of your screen

Chrome Tab Window

Entire screen

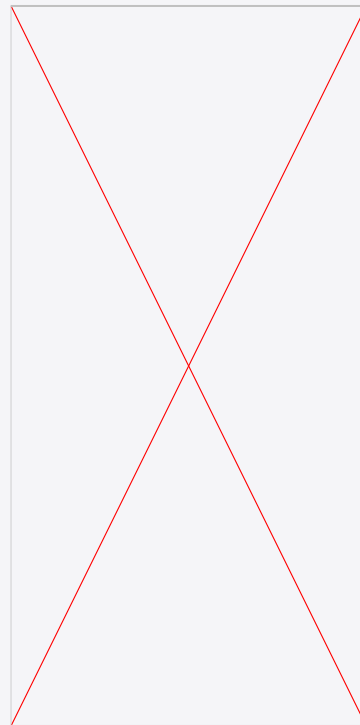
Select a tab to share

Also share tab audio

Share Cancel

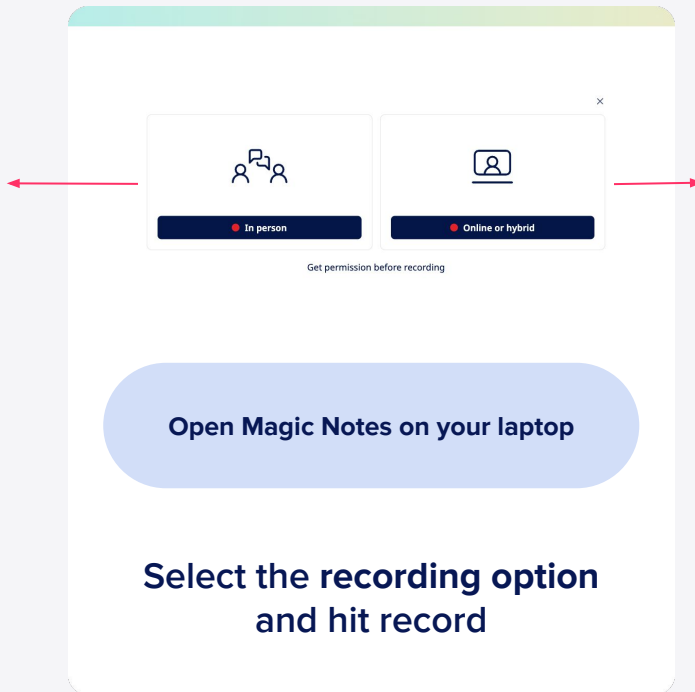
1 Click 'Entire screen' tab

3 Toggle on to share audio



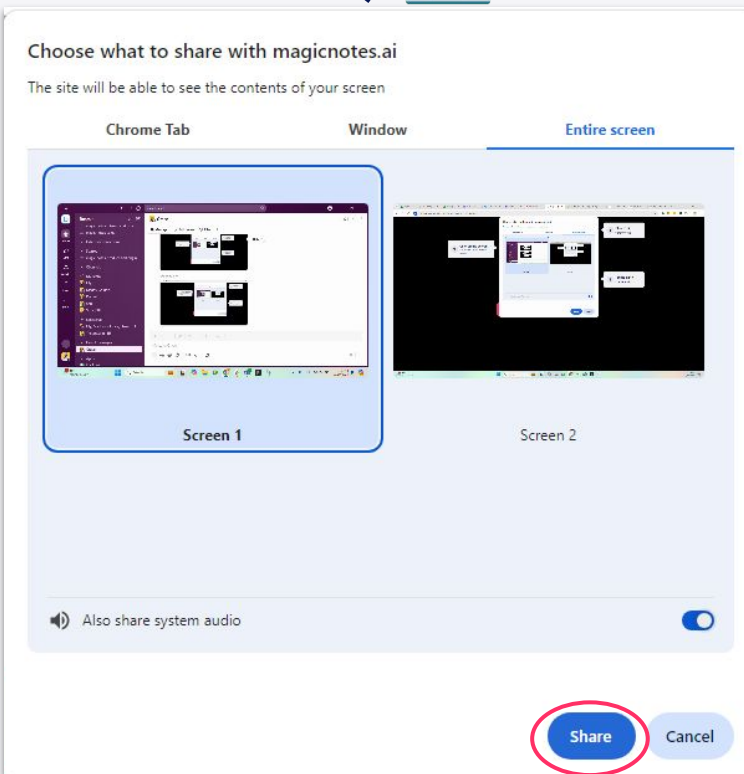
Making a recording from your laptop/desktop

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)



3

Click on the screen

You can select any that are shown

2

Click 'Entire Screen' tab

4

Toggle on to 'share audio'

5

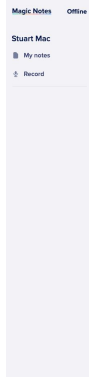
Click 'share'

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



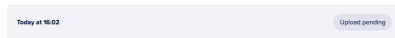
Ready to upload

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



Upload pending

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



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.

OK

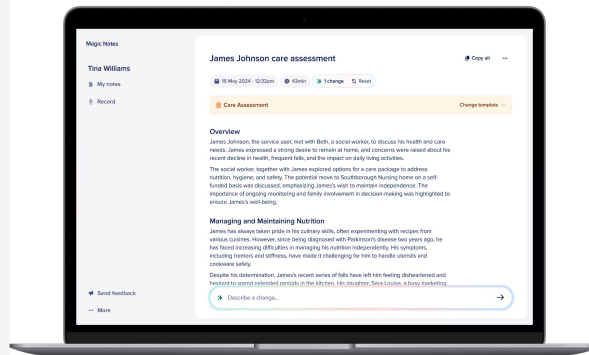
Accessing Magic Notes

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 

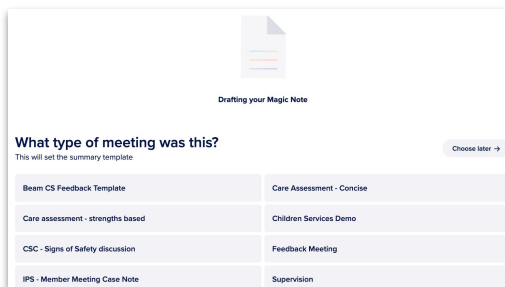


Edit your Magic Note on your laptop

3 Understand how to customise your Magic Notes

1 Choose your template when you have finished recording.

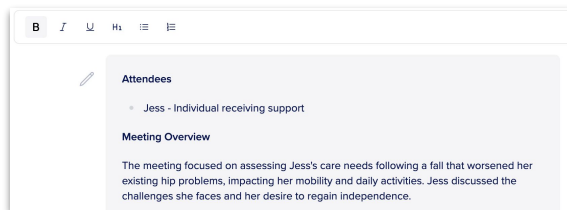
- Choose the best fit template or the generic 'General Meeting'
- Change this later if you want



What type of meeting was this? <small>This will set the summary template</small>	
Beam CS Feedback Template	Care Assessment - Concise
Care assessment - strengths based	Children Services Demo
CSC - Signs of Safety discussion	Feedback Meeting
IPS - Member Meeting Case Note	Supervision

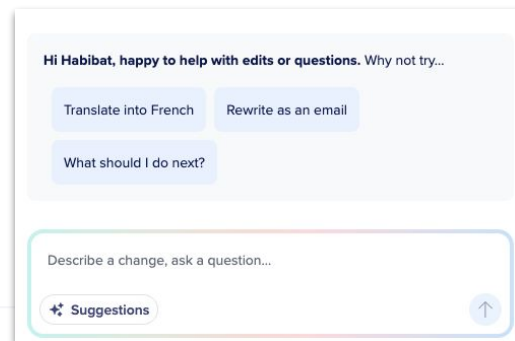
2 Directly edit your summary, just like you would on a document

- 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!



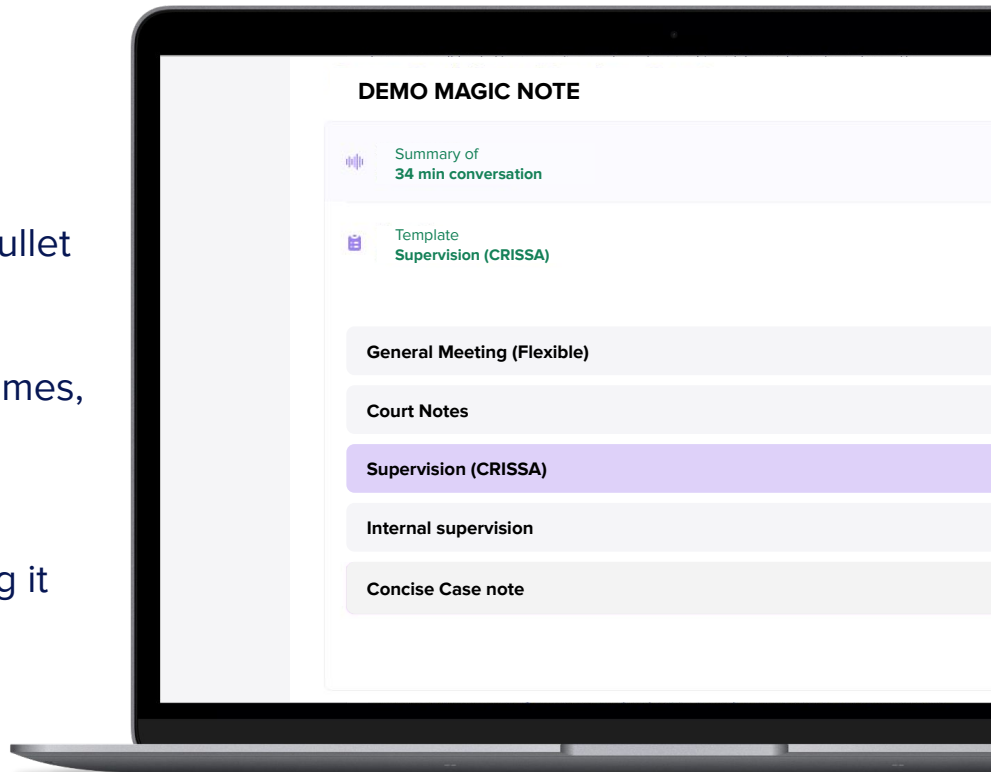
How do 'Templates' work?

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



Observations



Reflections



Analysis



Forgotten
details

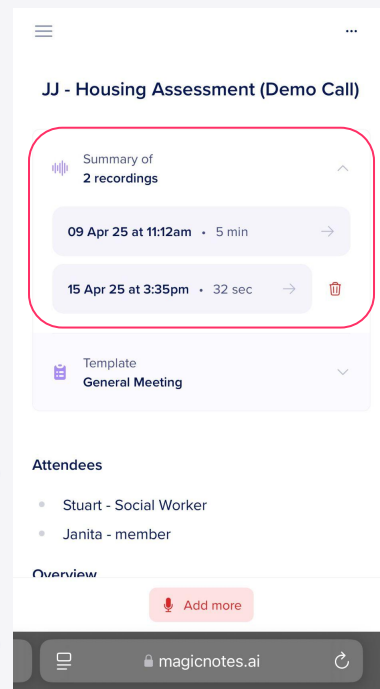
What will my Commentary look like?

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.



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



Contact
us

● Online

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



Copy all

What could we have done better?

Captured all the details really well, actions could be better if bullet pointed!

Please note feedback will be collated and used for product improvement and research. Please do not include any sensitive information.

Submit

All others

Analytics

Janita Jayapiragas

My notes

Record

Create report

Folders

Manage Users

Help Centre

More



Contact us

Tip



Adding to Home Screen

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](#)




Magic Notes



Magic Notes

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

