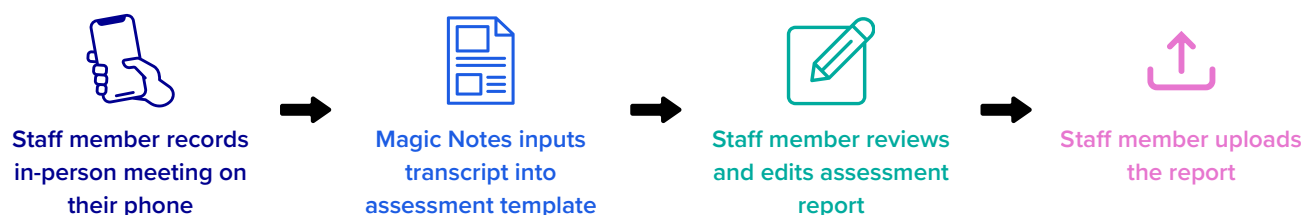# Magic Notes validation findings

Context

Social care staff spend over 50% of their time on case recording, paperwork, documentation, IT tasks, and meetings, which limits the time dedicated to interactions with clients (people that draw on care and support). Magic Notes, created by Beam, is a generative AI tool for recording, transcribing and summarising discussions and assessments. Kent County Council implemented Magic Notes, used by 29 staff members over an eight-week period to complete care needs assessments, occupational therapy assessments, or for general use, such as team meetings. The following pathway highlights how Magic Notes was used:

Staff member records in-person meeting on their phone ➡ **Magic Notes inputs transcript into assessment template** ➡ **Staff member reviews and edits assessment report** ➡ **Staff member uploads the report**

Beam conducted an evaluation to explore whether Magic Notes delivered benefits to social care staff in Kent County Council. Unity Insights were commissioned by Beam to validate their methodology and findings.

Evaluation method

Usage data was collected by Beam through Magic Notes and analysed by Beam to obtain metrics such as the total number of recordings made by staff each week.

Pre- and post-implementation staff surveys were created, and responses were analysed, by Beam. Surveys covered themes such as time savings, submission speed, and ease of use.

Staff feedback was also collected regularly through working groups to identify learnings throughout the pilot. No analysis was conducted on the staff working group notes. Instead, quotes were identified and used to supplement other findings.

Validation method

The approach taken to the validation leveraged Unity Insights' experience as an independent evaluator, alongside the NICE Evidence Standard Framework (ESF), which informs the evaluation of digital health technologies (DHTs) for use in the health and care system. The insights gathered from Beam were analysed against relevant standards to determine the level and quality of evidence in fulfilling each standard.

Methodology validation

The method of analysis used for usage data analysis was overall appropriate, however there was room to improve the robustness of analysis. Statistical testing was not conducted on the usage data, meaning no statistical conclusions could be drawn. Survey questions appropriately answered the evaluation questions, however demographic and occupational data was not collected, meaning there was no indication of whether the sample was representative of the wider staff population. Staff working group responses were also not analysed through thematic or sentiment analysis, limiting the robustness of the analytical method chosen.

Effectiveness

Overall, 366 recordings totalling 169 hours were made across the eight-week pilot.

6.8	**2.8**	**8.7/10**	**9.1/10**
hours saved per week when completing written admin and documentation	hours saved when completing a care needs assessment or an occupational therapy assessment	average staff rating on ability to capture details of conversations when using Magic Notes (compared to 6.2/10 before)	average staff rating on quality of conversations when using Magic Notes (compared to 6.8/10 before)

Beam's evaluation confirmed that Magic Notes reduced administrative time and improved work quality, with minor limitations in the analytical method not affecting the overall interpretation of findings.

Acceptability

96% of users found Magic Notes 'very easy' or 'easy' to use.

100% of staff reported that people who draw on care and support were either 'very receptive' or 'mostly receptive' to the use of Magic Notes.

Challenges to adoption included delays in staff completing their first recording and audio issues affecting staff confidence when using Magic Notes. Targeted support and individual testing helped to alleviate these issues.

Beam's evaluation suggested that Magic Notes improved the quality of conversations and written documentation, though further analysis is needed to further understand staff and client perceptions.

NICE ESF for DHTs

Standard 15: Show real-world evidence that the claimed benefits can be realised in practice.
Evaluation findings suggest Magic Notes was acceptable to its users and yielded staff time savings. Staff suggested no negative impacts on people that draw on care and support or services, and that Magic Notes was successfully integrated into their routines. This suggests the evaluation contributed towards fulfilling standard 15. The evidence base could be strengthened by conducting a time-and-motion study and replicating the evaluation in further implementation areas.

Standard 16: The company and evaluator should agree a plan for measuring usage and changes in the DHT's performance over time.
Beam measured weekly usage of Magic Notes. Continuation of usage data monitoring should be organised alongside Kent County Council to contribute towards standard 16. As Magic Notes uses AI, Beam and Kent County Council should agree on post-deployment reporting of changes in performance, processes for measuring performance, and agreeing who, how, and when performance changes should be reported. This will further contribute towards standard 16.

Limitations

- A less conservative method was used to analyse time savings in survey data, however using a more robust method did not change the conclusion of the analysis. It was assumed that survey responses were an accurate representation of the wider staff population, however no demographic or occupational data was available to determine whether this was the case.
- It was unknown whether staff were spending their time saved on completing further assessments.
- Qualitative feedback collected through free-text survey responses and staff working groups was not analysed using thematic or sentiment analysis, making findings open to potential bias.
- The acceptability of Magic Notes was assessed only among participating teams and did not include input from people that draw on care and support or staff who did not opt into the pilot.

Recommendations

To gather more robust, role-specific data on time savings, which would increase accuracy of the model, conduct a time-and-motion study and include statistical testing for validity.

To identify how staff are using their time saved, track the number of assessments completed before and after Magic Notes.

To enhance survey analysis, incorporate PDQI-9 measures, statistical testing, and thematic analysis, while capturing demographic, occupational, and accessibility data.

To explore non-engagement and inform future implementation strategies and increase adoption, collect feedback from people who draw on care and support and staff who opted out of using Magic Notes.

Conclusion

Analysis conducted by Beam correctly identified that Magic Notes reduced the administrative burden on staff, improving workflow efficiency and documentation quality. Looking ahead, future evaluations should increase the accuracy of data collection methods and analysis and incorporate client perspectives and demographic details to improve quality of analytical insights.

It was unknown whether staff were spending their time saved on completing further assessments. Realising the full potential of Magic Notes will depend on careful selection of use cases, along with continued efforts to increase adoption and improve data accuracy to enhance care delivery and outcomes.