

Evaluation of test and learn of Magic Notes in Kent County Council Adult Social Care Team

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Executive summary

Context

Research indicates that social care staff spend over 50% of their time on case recording, paperwork, documentation, IT tasks, and meetings (Burbidge, 2022), which limits the time dedicated to interactions with people who draw on care and support (Samuel, 2022).

Magic Notes is a generative AI tool for recording, transcribing, organising and summarising discussions. Its creator, Beam, explored the potential for Magic Notes to deliver benefits to social care workers in Kent County Council.

Test and learn phase

Members of the Kent County Council Adult Social Care Team tested Magic Notes over an 8-week period in May-June 2025. The main use cases were in care needs assessments and occupational therapy assessments.

Key findings

- Staff reported improvements in the time spent writing up notes, with an average reduction of 2.7 hours per assessment (48%). This enabled them to complete their work within core hours more often, improving staff work-life balance.
- Supervisors reported that fewer amendments to reports were needed due to improved quality and consistency.
- While using Magic Notes, staff gave positive feedback on the quality of conversations they had with people drawing on care and support, with scores increasing from 6.8/10 to 9.1/10.
- The time taken to submit assessments reduced by 49% on average, going from 5 days to 3 days.

Conclusion

Magic Notes demonstrated strong benefits, particularly through time savings and improved efficiency. It enabled staff to focus on people who draw on care and support and have a better work-life balance.

Detailed context and background

Adult social care

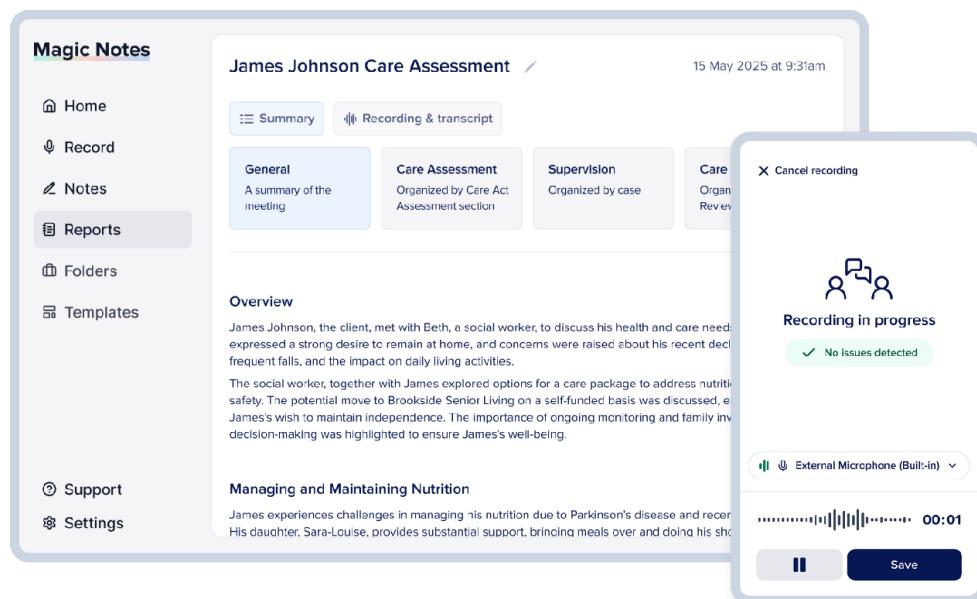
Adult social care practice in the UK focuses on assessing individuals' needs and providing appropriate care solutions. Social care staff work in multi-disciplinary teams (MDTs) including social workers, social care staff, occupational therapists and occupational therapy assistants.

People who draw on care and support within the social care pathway will typically begin with a referral that triggers an initial meeting between themselves (and their carers) and a social care team member. The social care team member will then produce an assessment of the person's needs and a recommendation of how they may be met. Effective engagement with individuals is crucial for understanding and supporting their needs. Administrative tasks consume over 50% of social care staff's time, limiting direct client interactions.

Introduction to Magic Notes

Magic Notes is a generative AI tool designed to streamline documentation in social care. Developed by Beam, it records, transcribes, organises and summarises discussions in seconds. The tool aims to reduce administrative burdens, allowing staff to focus more on interactions with people who draw on care and support.

Magic Notes aims to deliver efficiency savings and, therefore, greater value for money by automating the creation of detailed assessments from recorded sessions. This enables a more efficient use of existing resources while supporting improvements in the quality and timeliness of care.



The screenshot shows the Magic Notes software interface. On the left is a sidebar with navigation links: Home, Record, Notes, Reports (which is selected), Folders, Templates, Support, and Settings. The main area is titled 'James Johnson Care Assessment' and shows the date '15 May 2025 at 9:31am'. It has tabs for 'Summary' and 'Recording & transcript'. Below these are four cards: 'General' (A summary of the meeting), 'Care Assessment' (Organized by Care Act: Assessment section), 'Supervision' (Organized by case), and 'Care' (Organ Review). A modal window titled 'Recording in progress' is open, showing a recording interface with a microphone icon, a progress bar at 00:01, and a 'Save' button. The status bar in the modal says 'No issues detected'.

Methodology

Implementation setting

The Kent County Council Adult Social Care Service implemented Magic Notes within its Adult Social Care Community Teams. Some 29 staff members opted in to use Magic Notes between 5th May 2025 and 27th June 2025. This period was named the '*test and learn phase*'.

Staff members in adult social care community teams were invited to use Magic Notes during the test and learn phase. Training was delivered in person and virtually for staff who volunteered to take part.

The main use cases for implementation within Kent County Council were across two assessments, summarised below. Staff could also use Magic Notes for '*general use*' tasks, such as taking meeting notes or case notes.

Use case	Conducting staff member	Details
Care needs assessment (CNA)	Social workers and social care officers	A care needs assessment is a process that evaluates an individual's care requirements to determine the types of services and support they may need.
Occupational therapy assessment (OT)	Occupational therapists and occupational therapy assistants	An occupational therapist assessment is a process used to evaluate an individual's ability to perform daily activities and identify areas where they may need support.

Data Collection

Data was captured and analysed by Beam during the test and learn phase through staff surveys, staff working groups and usage metrics. This data was validated by Unity Insights, an independent evaluator that works closely with Health Innovation Kent Surrey Sussex. In addition, Health Innovation Kent Surrey Sussex held review meetings with the Kent County Council Adult Social Care team to capture learnings from this test and learn phase.

Benefits reviewed were:

- time saved completing assessment reports
- improved quality of assessments
- improved consistency of assessments
- reduced supervisor time needed to review assessments
- speedier completion of assessments

Results from the test and learn phase

Benefits

The study demonstrated the following benefits:

1. Assessment admin time saving

- Staff were better able to complete their admin work in core hours, rather than having to work in their own time.
- Staff reported a time saving for writing care needs assessments and occupational therapy assessments with an average approximate saving of 2.7 hours per assessment (48% reduction).
- Staff were able to use Magic Notes outside of assessments, such as for case notes, internal meeting notes and other frontline conversations ,which led to further time saving and requests for more bespoke templates (such as for supervision).
- Staff saved 7 hours per person per week on average.

2. Improved quality and consistency of assessments

- Audits demonstrated that assessments were of a better quality and more consistent than when done without Magic Notes.
- Using Magic Notes helped with quality assurance, allowing supervisors to see training needs for staff and to share best practice in assessment completion.
- The reported level of detail captured in notes increased from 6.2 to 8.7/10 (+40%).

3. Reduced supervision time on assessments

- Supervisors reported having to spend less time reviewing and amending assessments, which enabled them to focus on higher-value work. It is also likely that better quality assessments enabled improved care allocation, thus reducing costs.

4. Impact on people who draw on care and support

- Staff were able to complete assessments more quickly and hence were able to more quickly return reports to the person receiving care or support. The time taken to submit assessments reduced by 49% on average, going from 5 days to 3 days.
- Quality of conversations rated increased to 9.1/10 with Magic Notes from 6.8/10 without Magic Notes (+34%).
- Staff enjoyed using Magic Notes, with 67% saying they found it very easy to use
- Staff reported that it improved how they worked with people who receive care and support. 100% of staff said that people they worked with were receptive to the use of Magic Notes.

Qualitative staff feedback

Time saved

“Magic Notes has helped me reduce my admin time significantly”.

“Magic Notes have saved so much time when typing case notes, assessments, mental capacity assessments. PLEASE DO NOT TAKE IT AWAY!”

Quality

“Magic Notes has also improved the quality of my assessment as I have been able to converse with the person more effectively and the information that has been taken for the assessment has been a lot more detailed than I would have been able to record”

Ease of use

“I would not describe myself as tech minded but found Magic Notes incredibly easy to use”

“I found Magic Notes could be tailorable to how I work. It was very easy to amend any errors. Overall, I found it very good to producing a first draft and excellent for producing a summary of the visit”

Staff reported feedback from people who receive care and support

“People that have received a copy of their assessment feel that the assessment is accurate and detailed”

“The residents I met were very receptive to it and I was able to focus on them more rather than making sure I had written everything I needed to down”.

One staff member recalled that *“Several declined due to concerns regarding use of AI”*

Overall

“Would love to keep this. I can see a huge benefit for the staff and residents of KCC”

“I think it's brilliant. I really, really love it, and I don't like the thought of having to go back to how we were originally doing assessments” and “I see a wide use of Magic Notes through KCC with its ability to document supervisions, reviews, team meetings. I feel that Magic notes supports disability and using this across KCC would support the recruitment and retention of staff”.

“Magic Notes has impacted positively on the way I complete assessments... allowing good conversations. It is ... easily editable after completion. It is reliable ... I have confidence that it will capture what I will require. I feel the client's voice comes through... I do not want to go back to the old way of doing things”

Feedback from the Senior Responsible Officer

“We are delighted with the impacts seen during the Magic Notes Test & Learn and excited about the opportunity to scale these benefits across our service. By saving valuable time, Magic Notes enables our staff to focus on what matters most - offering tailored support and building stronger relationships with people who draw on social care and support. The response from staff has been fantastic, and it's clear this approach can help us not only improve efficiency but also enhance the quality of care and support we provide for our Kent residents.”

Tricia Pereira, Head of Service Improvement & Interim Assistant Director
Strategic Safeguarding, Practice, Policy & Quality Assurance; Adult Social
Care and Health (ASCH) Kent County Council

Additional benefits

There are similarities between social care staff assessments and those carried out by staff in mental health and community care. Applying the learning from the social care test and learn phase shows that in a generic community care scenario there could be potential benefits to assessments of ADHD, autism, continuing healthcare assessments and other health needs assessments.

Learning from the implementation of Magic Notes

Initial challenges and blockers to adoption were addressed and overcome during the testing phase, through regular feedback meetings. For example, a delay among some staff in completing their first recording was addressed by providing extra training and encouragement. Where audio quality issues were noted, solutions were explored, such as the use of discrete lanyard microphones.

Feedback demonstrated that Magic Notes supported accessibility by reducing barriers to documentation. Staff reported fewer headaches and shoulder pain due to reduced typing and indicated that Magic Notes reduced barriers to documentation for staff with diverse work needs.

Discussion

Current time-saving estimates were primarily based on staff survey responses, which may introduce bias or inaccuracy. A time-and-motion study would offer a more objective and granular understanding of time spent before and after Magic Notes implementation, improving the reliability of future analyses.

Whitehead et al. (2022) and Woolham et al. (2019) identified that extensive documentation requirements and time pressures can reduce the quality of social care assessments and attention to individual needs.

Magic Notes enables staff to record assessment meetings and organise the information within a structured template. This approach helps staff maintain focus on the person being assessed rather than on notetaking, making social care staff more likely to capture important details, ask relevant follow-up questions, and fully engage in conversation. As a result, assessments can be more detailed and accurate, supporting better decision-making, improved outcomes and a more positive experience for people drawing on care and support.

Future plans

Staff see the benefit of using Magic Notes and have asked for developments such as more bespoke templates and better training on customisation.

This study is based on a short implementation period and staff-reported outcomes. A detailed evaluation by the Kent Research Analytics team is planned for early 2026 to assess the full impact of using Magic Notes across the Adult Social Care Team.

Conclusion

The test and learn phase demonstrated that Magic Notes can significantly improve efficiency, quality, and user experience in adult social care. It enabled staff to focus on the people who draw on care and support and have a better work-life balance. Looking ahead, further research into workflow efficiency over a longer time period will improve the insights gained from using Magic Notes.

Acknowledgements

This report has been compiled by Health Innovation Kent Surrey Sussex with input from Kent County Council Adult Social Care Team, Beam (Magic Notes), and Unity Insights.

Appendix 1: References

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