

South Gloucestershire Council – Use of Beam Notes

Privacy Notice

Effective Date: 7 Aug 2026

Data Controller: South Gloucestershire Council

Purpose of this notice

This privacy notice explains how South Gloucestershire Council will collect, use and protect your personal information when using Beam Notes across approved Adult Services, Children's Services, Education, Learning and Skills, and HomeChoice activities.

This notice should be read in conjunction with our [General Privacy Notice](#).

What is Beam Notes?

Beam Notes is a secure digital tool that helps staff record and manage notes from meetings or conversations with service users. Instead of writing notes by hand, staff can use their work phone or laptop to record the conversation. This recording is safely stored and turned into a written transcript.

Using artificial intelligence (AI), Beam Notes creates a summary of the conversation based on agreed guidelines. Staff can also ask the system to simplify the summary into plain English or an easy-read version if needed.

Beam Notes also helps staff create reports. It can gather information from different conversations and automatically fill in report templates, saving time and making sure the information is clear and consistent.

This tool is designed to:

- Make note-taking quicker and more accurate
- Help staff focus more on the people they support
- Improve the quality and security of records
- Reduce paperwork and manual typing
- Support better service delivery

Importantly, Beam Notes does not make decisions about people. It simply helps staff record and organise information more efficiently.

Services Covered

This notice applies to the following services using Beam Notes.

- Adult Social Care Services

- Children's Social Care and Early Help Services
- HomeChoice and Housing Services
- Education learning and Skills

Permitted use of Beam Notes

Beam Notes may only be used for the following approved activities:

- Personal, case and group supervision
- Internal staff meetings
- Project meetings (where appropriate)
- Self-dictation
- HomeChoice homelessness assessments and interviews
- Children's social care visits
- Adult Social Care Conversations 1, 2 and 3
- Occupational Therapy (OT) assessments
- Education, Health and Care Plan (EHCP) Reviews (controlled pilot)
- Deprivation of Liberty Safeguards (DoLS) Applications (controlled pilot)
- Adult Multi-Disciplinary Team (MDT) Meetings (controlled pilot)

Use in multi-agency meetings involving children and families is not permitted unless specifically authorised through an approved governance process and DPIA. Adult MDT meetings are permitted as a controlled pilot activity.

Why we collect your information

We collect and use your personal data to:

- Record interactions and observations during service delivery
- Support care planning and decision-making
- Improve service quality and responsiveness
- Ensure legal and regulatory compliance

Legal basis for using your data

The lawful basis for processing personal information using Beam Notes depends on the service being provided and the nature of the interaction. Processing may be carried out under Article 6(1)(e) UK GDPR (Public Task), Article 6(1)(c) UK GDPR (Legal Obligation), Article 9(2)(g) UK GDPR (Substantial Public Interest), Article 9(2)(h) UK GDPR (Health and Social Care), or consent where this is the appropriate lawful basis for the activity being undertaken.

What information we collect

Depending on the service, Beam Notes may collect:

- Your name, contact details, and demographic information

- Notes and observations from meetings or service interactions
- Health, care, or housing-related information
- Audio recordings and written transcripts (where applicable)

How we use your information

Transcripts generated by Beam Notes are AI-produced and may contain inaccuracies. Staff are responsible for reviewing, correcting, and validating the content before it is shared or stored.

Beam Notes does not make decisions about individuals. Any transcript, summary or report generated by Beam Notes is reviewed by a practitioner, who remains responsible for professional judgement, any decisions made, and the final record.

For approved Adult MDT meetings, Beam Notes may be used to create transcripts and summaries of professional discussions to support accurate recording of agreed outcomes and actions.

The final transcript or summary is considered the official record—not the original recording.

Your information will be used to:

- Support your care or housing needs
- Share relevant updates with professionals involved in your support
- Monitor and evaluate the pilot programme

Who we share your information with

We may share your information with:

- Internal council teams involved in your care or housing
- NHS and health partners (e.g., Connecting Care)
- Approved third-party providers supporting the pilot

Where Beam Notes is used during approved Adult MDT meetings, information may be shared with partner agencies already involved in your care and support in accordance with existing legal powers, professional duties, information sharing agreements, safeguarding arrangements and statutory frameworks.

We will not share your information for marketing purposes.

How we store your information

Information collected through Beam Notes is stored securely in accordance with UK data protection legislation. Access is restricted to authorised personnel only.

Beam Notes is used solely as a means to create an official record of interactions and observations. It is not intended to be used as a corporate record within our social care management system.

- Retention Period: Recordings and notes generated via Beam Notes are retained for six (6) weeks. After this period, both the original recording and any associated notes are permanently deleted.
- This retention period is subject to ongoing review and may be updated in line with legal or operational requirements.

Retention and legal disclosure

Recordings and notes are retained for six (6) weeks and then permanently deleted. However, if Beam Notes is used in the context of criminal investigations, both the transcript and recording must be downloaded and securely saved to the relevant case record for legal disclosure purposes. These will be retained beyond the standard period in accordance with legal obligations.

Your rights

You have the right to:

- Access your information
- Correct inaccurate data
- Withdraw consent
- Request deletion of your data (where applicable)

Contact us

For any questions or concerns about this privacy notice or the use of Beam Notes, please contact:

Data Protection Officer

South Gloucestershire Council

Email: DPO@southglos.gov.uk