Equality Impact Assessment

What is an Equality Impact Assessment (EIA) and why does the County Council do them?

The Public Sector Equality Duty (PSED) is an obligation within the Equality Act 2010 ("the Act"), which asks public authorities, like Hampshire County Council, to give 'due regard' to equality considerations, in particular to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.

- Advance equality of opportunity between people who share a protected characteristic and those who do not.

- Foster good relations between people who share a protected characteristic and those who do not.

This includes assessing the impact of policies and practices on individuals and communities with a protected characteristic, as defined in the Act and some other specific groups. The County Council uses EIAs to ensure it has paid 'due regard' to equalities considerations when there are changes to a service or policy, a new project or certain decisions.

EIA author	**Position & Department**	**Contact**
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Title:	BEAM (Magic) Notes
Related EIAs:	None
EIA for Savings Programme:	No
Service affected	Services affected include both the Adults' Health and Care Directorate (AHC) and Children's Services Directorate (CSD) – approximately 2,500 social care practitioners across both Directorates are using BEAM Notes (formerly known as Magic Notes).
Description of the service/policy/project/project phase	Adults' Health and Care social care teams and Children's Services Children and Families teams support individuals, families and carers through assessment, safeguarding, care planning, reviews and multi-agency working. As part of their statutory responsibilities, practitioners are required to maintain accurate and timely records of meetings, discussions, decisions and actions to support effective care, safeguarding and service delivery.
New/changed service/policy/project	BEAM Notes is an AI-assisted note-taking tool that produces draft notes from meetings and conversations to support note taking and record keeping. BEAM Notes is designed to help staff create draft notes more efficiently so they can

	spend more time focusing on the people they support while maintaining accurate records. The tool is being used for both use of internal and external meetings including staff supervision. There are clear guidelines and expectations for practitioners to follow when using BEAM notes. In summary: staff must review and amend all content before it is added to any official record; decision making remains the practitioner's responsibility and the practitioner is accountable for their assessments regardless of the support tools used; BEAM notes can only be used where service users have been informed and agree to its use. BEAM notes is restricted for use of approved templates or meeting types, with all users having to complete mandatory training and to sign an understanding of undertaking to confirm their responsibilities for appropriate use, confidentiality, consent and review of outputs. A pilot of the 'Interpret' (translation) functionality within the tool is also being undertaken alongside the standard use of BEAM Notes to evaluate whether it can support conversations requiring interpretation, improve communication, and assist with the creation of accurate records where language support is needed.

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Equalities considerations - Impact Assessment

Age

Impact on public	Neutral
Impact on staff	Neutral
Rationale	**Decision Rationale:** **Public :**

	The public impact is considered neutral - BEAM Notes is not expected to have a differential impact on people based on age. The appropriateness of using the tool will vary however depending on an individual's age, for example some younger children and people without capacity (may include older adults but can also include younger adults with a range of conditions) who cannot give agreement may not be suitable for recorded meetings. In these cases, practitioners will take written notes in the usual way. The use of BEAM Notes does not alter the service provided, decision-making processes, or statutory responsibilities towards individuals of any age. **Staff :** For staff, feedback from the pilot suggested that BEAM Notes may help reduce the time spent producing records and may enable practitioners to focus more fully on conversations during meetings. While confidence in using digital tools may vary between age groups, the workforce profile indicates that BEAM Notes is being used across a broad age range. Mandatory training, guidance and support are available to all users. **Adults Users** **Age Total Percentage** 20 - 29 62 10% 30 - 39 170 28% 40 - 49 165 27% 50 - 59 160 26% 60 - 69 57 9% 70+ 3 0% **Children's Users** **Age Total Percentage** <25 45 3.54% 25 to 34 303 23.86% 35 to 44 373 29.37% 45 to 54 307 24.17% 55 to 64 210 16.54% 65 to 74 31 2.44% 75 to 85 1 0.08%
Mitigation	

Disability

Impact on public	Neutral
Impact on staff	Positive
Rationale	**Decision Rationale:** **Public:**

The public impact is assessed as neutral. While there is a risk that AI-generated notes may not always accurately reflect some communication needs or be suitable for all individuals with disabilities, the use of BEAM Notes is optional, requires the agreement of the individual (or appropriate representative), and remains subject to professional judgement. Practitioners can choose alternative note-taking methods where recording is not appropriate.

BEAM Notes may help practitioners focus more on conversations and engagement, supporting more person-centred interactions. As with any note-taking tool, practitioners should review notes to ensure they accurately reflect the individual's communication, preferences and key information. Practitioners are also to determine whether the tool is appropriate based on client's needs and disability.

Staff:

For staff, the reduction in manual note-taking may provide additional benefits for some disabled employees, particularly where writing, concentration, fatigue or other impairments make record production more challenging. However, this will vary according to individual circumstances and use of the tool remains optional.

AHC Users

Disability	Total	Percentage
Not listed	2	0%
Has a disability (or previously had one)	123	20%
Not informed/unknown	492	80%

Children's Users

Disability	Total	Percentage
Has a disability (or previously had one)	160	12.60%
No	922	72.60%
Not informed/unknown	188	14.80%

Mitigation/Actions:

Use of BEAM Notes is **optional, not mandatory**

Alternative note-taking approaches remain available and should be considered by all users if individuals lack mental capacity to agree to be recording. It should only be used where appropriate and professional judgement must be applied.

Individuals can **opt out of being recorded**

Training, guidance, and support provided to:

-
    - Support different accessibility needs
    - Ensure staff understand how to review and amend AI-generated content

	◦ Ongoing governance and feedback used to identify and address accessibility issues
Mitigation	

Gender Reassignment

Impact on public	Neutral
Impact on staff	Neutral
Rationale	**Decision Rationale*:*** **Public:** BEAM Notes is not expected to have a differential impact on individuals who are proposing to undergo, are undergoing, or have undergone gender reassignment. There is however, a low risk that AI-generated notes could incorrectly record information relating to an individual's gender identity, such as names or pronouns, or miss relevant context. All AI-generated notes and summaries will be reviewed by practitioners before being added to case records. Practitioners remain responsible for ensuring that information relating to gender identity is recorded accurately, respectfully and in line with professional standards. **Staff:** For staff, no differential impact has been identified. There is a low risk that AI-generated content could inaccurately record personal information such as names or pronouns. However, all outputs are reviewed and amended by users before being saved or shared, and staff remain responsible for ensuring information is accurate and respectful. The use of BEAM Notes is voluntary, and training and guidance are available to all users.
Mitigation	

Pregnancy and Maternity

Impact on public	Neutral
Impact on staff	Neutral
Rationale	**Decision Rationale:** **Public:** BEAM Notes is not expected to have a differential impact on individuals because of pregnancy, maternity or parental

	responsibilities. Conversations that include personal, health-related, pregnancy or maternity information may be sensitive and some individuals may prefer not to be recorded. BEAM Notes is only used where appropriate, and all outputs are reviewed by practitioners before being added to case records. **Staff:** For staff, no specific differential impacts have been identified. Feedback from pilot participants suggests that BEAM Notes may reduce the administrative burden associated with note-writing and record completion. This benefit is considered applicable across the workforce and is not specific to staff who are pregnant. Staff who return to work after maternity leave have equal access to the tool and the opportunity to access BEAM notes training online therefore there remains equity of access.
Mitigation	

Race

Impact on public	Neutral
Impact on staff	Neutral
Rationale	**Decision Rationale:** **Public** There is potential for inaccuracies in transcription, translation or interpretation involving different languages, accents or cultural contexts. AI-generated transcripts and translations may not always accurately capture accents, dialects, cultural references or conversations where English is not the person's first language. This could lead to errors if outputs are not checked. To reduce this risk, staff must review all content before it is saved, and alternative communication support remains available where needed. The translation and interpretation functionality is currently being piloted and evaluated. While this functionality may improve communication and support record creation where language support is required, there remains a risk that translations or interpreted content may not fully reflect context, cultural nuance or intended meaning. Professional judgement therefore remains essential and existing interpretation arrangements continue to be available where required. **Staff** No differential impact has been identified for staff based on race or ethnicity. There is potential for AI-generated transcripts, summaries or translations to inaccurately reflect accents, dialects, cultural references or language nuances. These risks apply to both staff and service users and are mitigated through mandatory review of all outputs, training, professional judgement and ongoing governance

arrangements. While some staff may find the tool supports record creation, this benefit is not considered specific to any racial or ethnic group.

Workforce Data as at 31st March 2026

The workforce data below provides context about the diversity of staff using the system.

Adults Users

Ethnicity	**Nos**	**Percentage**
Not listed	2	0%
Black African	46	7%
Black Caribbean	3	0%
Chinese	2	0%
Indian	11	2%
Mixed African	1	0 %
Mixed Caribbean	3	0%
Mixed Other	11	2%
Other Asian	2	0%
Other Black	4	1%
Other Ethnicity	2	0%
Pakistani	2	0%
Prefer not to say	11	2%
White British	478	77%

Childrens Users

Ethnicity	**Nos**	**Percentage**
Ethnic Minorities	239	18.82%
No Data Provided	4	0.31%
Prefer not to Say	29	2.28%
White	998	78.58%

Mitigation	

Religion or Belief

Impact on public	Neutral
Impact on staff	Neutral
Rationale	**Decision Rationale:** The impact is considered neutral for both the public and staff. Some people may not be comfortable with meetings being recorded because of personal, religious or cultural beliefs. BEAM Notes is only used where participants agree to its use. If someone chooses not to

	participate, practitioners will take written notes in the usual way. Staff remain responsible for ensuring information is recorded accurately and respectfully.
Mitigation	

Sex

Impact on public	Neutral
Impact on staff	Neutral
Rationale	**Decision Rationale:** Impact assessed as neutral for both the public and staff. There is no evidence from the pilot to suggest that the use of BEAM Notes advantages or disadvantages people because they are male or female. Any risks associated with the technology, such as inaccuracies within draft transcripts or summaries, are not specific to one sex and are mitigated through practitioner review and professional accountability.
Mitigation	

Sexual Orientation

Impact on public	Neutral
Impact on staff	Neutral
Rationale	**Decision Rationale:** The impact is considered neutral for both the public and staff. There is a low risk that personal information disclosed during conversations, including information relating to sexual orientation, relationships or family circumstances, could be inaccurately reflected in AI-generated draft notes if outputs are not reviewed appropriately. Practitioners review all outputs before they are added to records and remain responsible for ensuring information is accurate, respectful and relevant. The use of BEAM Notes does not change existing professional responsibilities regarding confidentiality, dignity, respect and person-centred practice. Individuals can decline recording and alternative note-taking methods remain available where appropriate.
Mitigation	

Marriage and Civil Partnership

Impact on public	Neutral
Impact on staff	Neutral
Rationale	**Decision Rationale:**

	No specific impacts have been identified for the public or staff. There is no evidence that the use of BEAM Notes creates barriers, disadvantages or benefits for individuals based on their marital or civil partnership status. Where information about relationships or family circumstances is discussed, practitioners remain responsible for ensuring that records are accurate, relevant and appropriately reflect the individual's circumstances. All AI-generated content is reviewed and amended before being added to official records.
Mitigation	

Poverty

Impact on public	Neutral
Impact on staff	Neutral
Rationale	**Decision Rationale.** **Public** The public impact is considered neutral. BEAM Notes is a practitioner tool and does not require individuals to have access to digital devices, internet connectivity or digital skills in order to receive services. The use of the tool does not change eligibility for support, access to services or the nature of the service provided. The service provided remains the same whether or not BEAM Notes is used, and the tool can operate offline where connectivity is limited. Use of BEAM Notes may help support accurate record keeping, but practitioners remain responsible for all records and decisions. **Staff** For staff, no specific impact related to poverty or socio-economic disadvantage has been identified. Training, guidance and access to the tool are provided through existing employment arrangements and no additional financial burden is placed on staff.
Mitigation	

Rurality

Impact on public	Neutral
Impact on staff	Neutral
Rationale	**Decision Rationale** **Public** Individuals in some rural areas of Hampshire, with more remote areas of the county, may experience limited or unreliable internet connectivity. This can affect the ease with which BEAM Notes can be used during meetings and may result in inconsistent use of the tool across locations. However, the service provided remains the same whether or not BEAM Notes is used, and the tool can operate offline

	where connectivity is limited. Use of BEAM Notes may help support accurate record keeping, but practitioners remain responsible for all records and decisions. **Staff** Although this does not affect access to services, it may reduce the opportunity to benefit from the administrative efficiencies and engagement improvements associated with the tool. The impact is considered low because alternative methods of recording information remain available and service delivery is not dependent on the use of BEAM Notes.
Mitigation	

Geographical Impact:All Hampshire

Equality Statement

Additional information:

This Equality Impact Assessment supports the implementation of BEAM (Magic) Notes across AHC and CSD

The assessment has considered:

- User feedback
- Governance processes and Data Protection Impact assessment
- Testing of new functionality (including BEAM Interpret translation tool)
- Engagement has taken place through:
    - User groups, surveys, and pilot/testing cohorts

The assessment identifies:

- Clear benefits in improving practitioner focus, engagement, and consistency of recording
- Some risks relating to digital inclusion, AI accuracy, and sensitivity of recording

These risks are mitigated through:

- Non-mandatory use of the system - users decide if they wish to use the tool to support note taking.
- Ability for individuals to opt out of recording - agreement must be given or alternative note taking must be used.
- Practitioner review of all AI-generated content - Practitioners sign and complete a Form of Undertaking to agree AI responsibilities.
- Ongoing training, support, and governance oversight - ongoing training and guidance tools are made available and updated regularly.

The proposal is considered:

- **Proportionate and justified**, with benefits outweighing risks
- **Low and manageable impact overall**, with appropriate mitigation measures in place
- Ongoing monitoring will take place through monthly Board and Senior User group meetings.
- Feedback, surveys, and governance groups are regularly happening to ensure changes and improvements are made consistently.
- Ongoing review of new functionality prior to wider rollout of implementation of any new templates

Overview Statement:

A summary assessment to show that due regard to the Public Sector Equality Duty has been paid, which is undertaken when a full EIA is not needed:

EIA reference number: 01248

Date of production of EIA for publication: 06/11/2026