



Illuminated Notes – Step-by-Step Guide for Associates

Audience: This guide is for clinicians who are new to Illuminated Notes.

1. What is Illuminated Notes?

Illuminated Notes is a secure digital assistant transcribes your clinical sessions to produce structured notes, summaries and communications. The tool uses speech-to-text technology to generate a written transcript of your consultation and leverages AI to draft comprehensive notes, GP referrals, follow-up letters, action lists and more. It does *not* replace your professional judgement, it is designed to save time and improve documentation quality so you can focus on your client.

2. Preparing to use the app

Illuminated Notes is hosted centrally and accessed via a secure Cloudflare login. You do **not** need to download or install anything on your own computer.

1. **Obtain authorisation** – Illuminated Thinking will provide access via www.illuminatednotes.net.
2. **Open the app** – In your web browser (Chrome, Edge or Safari), navigate to <https://notes.illuminatednotes.net>. This address is protected by Cloudflare Access.
3. **Log in through Cloudflare** – Follow the on-screen instructions. Once authenticated, you will be redirected to the Illuminated Notes home page.
4. **Secure connection** – Cloudflare ensures that all data transmitted between your browser and the server is encrypted.

3. Obtaining client consent

You **must** obtain the client's informed consent before recording any session with Illuminated Notes. Provide them with the client consent form link (<https://tally.so/r/mK9ZP7>) and information leaflet. The client has the right to decline or withdraw consent at any time.

4. Starting a session

1. Once logged in, you will land on the **Session** page.
2. **Create a new session** – Enter the client's name or the meeting title in the **Name** field and click **New session**. The app will generate a unique session ID and prepare to record. For each client, best practice is to type the name exactly so that future sessions can be linked, e.g. Monica Smith vs monica smith.
3. **Begin recording** – Click **Start Recording**. Speak clearly and conduct your consultation as usual. The timer will show the elapsed time. You can pause or stop recording at any time.
4. The transcript area will update after each 20–30 second audio chunk with partial and final text. You may also click **Refresh transcript** to ensure it is up to date.



5. Generating clinical notes

After your session ends:

1. Go to the **Notes** tab.
2. Tick the therapy models used (e.g., CBT, DBT, ACT). These headings help structure the note.
3. Add any **extra instructions** (for example, “Emphasise behavioural activation homework”). You can also paste the directives you want in your notes (e.g., to use the client’s name and omit empty sections).
4. Click **Generate note**. Within a few seconds, a structured note will appear in the output box. Review it carefully; you remain responsible for ensuring accuracy.
5. Use the **Copy note** button to copy the text to your clipboard and paste it into your client record.

6. Communications and planning

The **Communications** tab helps you generate letters or summaries for different audiences. Enter a prompt (e.g., “Draft a GP referral letter summarising diagnosis, treatment and next steps”) or choose a quick template (Referral, Follow-up, Insurer, Safety Plan). Click **Generate**, then copy and paste the result into your correspondence system. Always review and amend as necessary.

The **Planning & Questions** section in the **Insights** tab allows you to plan future sessions or ask questions about the transcript. Enter a request such as “Plan the next session focusing on cognitive restructuring” and click **Generate plan/answer**. Use the suggestions alongside your clinical judgement to prepare for the next appointment.

7. Analysis tools

In the **Insights** tab you can:

- **Generate a summary** – Choose a length (short, medium or long) and click **Generate summary**. This provides a concise recap of the session.
- **Extract action items** – Click **Extract actions** to identify agreed-upon tasks, decisions and deadlines.
- **Search the transcript** – Use the search bar to find specific words or phrases in the transcript.
- **Risk analysis** – Click **Analyse risk** to highlight mentions of risk factors or safety concerns.

All outputs include a **Copy** button so you can paste them into clinical records or communications. Remember to remove any sections that do not apply or need refinement.



8. History and export

The **History** tab lists all saved sessions with dates and client names. Click **Open** next to any session to view its transcript, and created note, summary, actions, risk analysis and plan. Each section includes a copy button.

You can export a session via the **Export** tab. Choose **Download PDF** to generate a formatted report or **Download TXT** for plain text. Save the file in your client's record.

9. Data security and confidentiality

- Illuminated Notes processes and stores data in our clinic in Glasgow under strict security protocols, meeting NHS and GDPR requirements.
- Access is controlled via Cloudflare, meaning only authenticated users can enter the system. Do not share your login with anyone else.
- Only authorised staff have access to session data. Do not share transcripts or outputs outside the clinical team.
- All data is encrypted in transit and at rest. Cloudflare provides an additional layer of security by inspecting and filtering traffic, helping to prevent unauthorised access. Always log out when you finish using the app, especially on shared devices.

10. Troubleshooting and support

- **Audio isn't recording** – Ensure your microphone is connected and permitted in the browser. Refresh the page and try again.
- **Can't log in** – Make sure you are using the correct URL and credentials. If multi-factor authentication fails, request a new code or contact the team.
- **The app doesn't load after login** – Check your internet connection. If the issue persists, contact the team—there may be a problem with the central server.
- **Slow responses** – This may occur if the OpenAI service is busy. Wait a moment and try again.

Remember: Illuminated Notes is a tool to help you document and plan your work more efficiently. It is not a replacement for clinical expertise. Always exercise professional judgement when reviewing or sharing generated content.