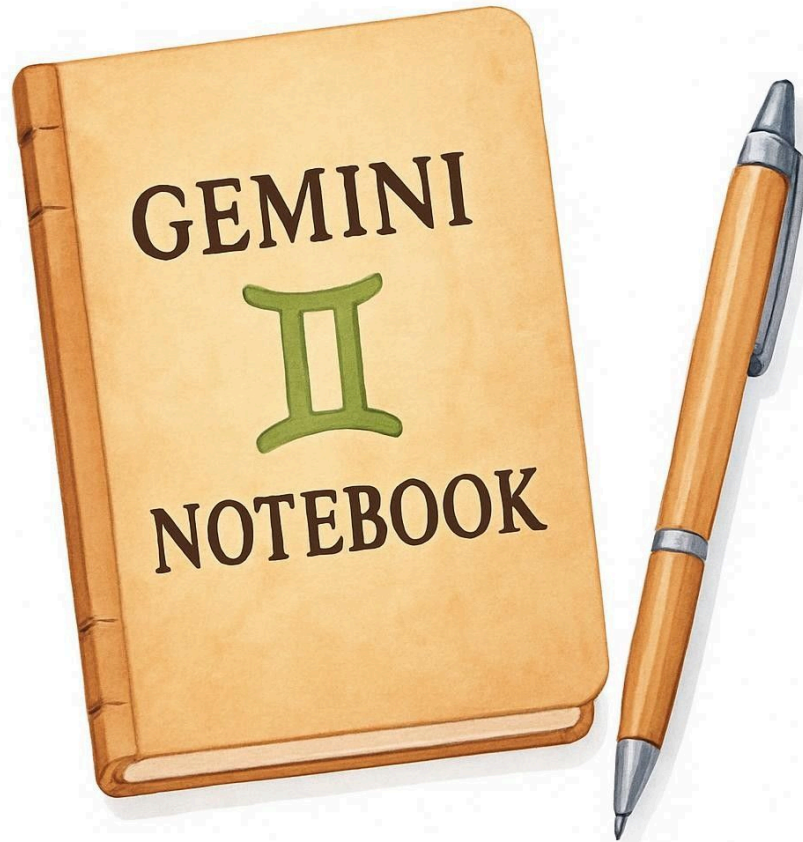




The Incredible, Amazing AI Tool You Will Fall In Love With!

A Practical Gemini Notebook Workshop for Aging in
Place Professionals

Presenter: Esther Kane, CAPS, C.D.S.

Email me if you would like another webinar on any specific Gemini Notebook feature.
esther@aginginplacedirectory.com

	ChatGPT / Gemini chat	Gemini Notebook
What it reads	The whole internet	Only your files
Can it make things up?	Yes, sometimes	Much less likely
Shows you where it got the answer?	Sometimes	Every time, with a click
Best for	Brainstorming, drafting	Trusted answers from the documents you upload

Samples of What Google Gemini Creates

The webinar would be too long to go over the products that Google Gemini creates so I put as much as I could online. Here's the link - go over them on your own time.

<https://aipdinsiders.com/samples-of-gemini-notebook-productions/>

Sources it accepts



PDFs

Assessment forms, manuals, discharge papers, code documents



Google Docs, Slides, and Sheets

Live documents that can be refreshed



Microsoft Word documents and Excel or CSV files

Standard office formats



Website links

Any public web page



Audio files

Your own voice memos



Photos of documents

It reads the text in the image

Also accepts: YouTube videos that have captions, and text you paste in.

Google Docs stay alive. PDFs do not.

Google Doc

If you add a **Google Doc**, you can refresh it later and the notebook updates.

PDF

If you add a **PDF**, it is frozen at the moment you uploaded it.

If you have a document you update often, like your standard recommendations list or your preferred vendor sheet, keep it as a Google Doc and add it that way. Then when you change the doc, you click refresh in the notebook and it is current. If you upload it as a PDF you will have to delete and re-upload every time.

BUILD YOUR FIRST NOTEBOOK

Our example client for today

82 years old

Fell in the bathroom, hospitalized
6 days - suffered only bruises but
is weak.

Coming home in 9 days

Daughter lives out of state in Arizona and is anxious

Family speaks Spanish at home, adult children speak
English

Go to notebook.google.com

01

Sign in with any Google account

02

Free forever, no trial, no card. *(But know that there are paid versions)*

03

Click **Create new notebook**

If you have a Gmail address you already have access. If you use Google Workspace for your business, you already have access, and often a better version of it.

For Mrs. Ruiz I am adding:

01

The hospital discharge summary (PDF) - A de-identified clinical summary — copy only the relevant details (weight bearing status, equipment needs, follow-up appointments) from the discharge summary, leave out the name, diagnosis, and any identifying info, paste into a Word doc, and upload that instead

02

My home assessment notes (Google Doc) - or you could just upload a voice memo recorded walking the house (audio file)

03

Photos of the bathroom doorway with measurements

04

The manufacturer page for the grab bar I want to spec (link)

⊗ ⚠ **Demo Purposes Only — HIPAA Notice:** In practice, never upload real client documents containing PHI (Protected Health Information) to a personal Google account without a signed **HIPAA Business Associate Agreement (BAA)**. Google offers a BAA for qualifying Workspace accounts. So, speak with your company about this.

The chat panel

Type your question. Get an answer. Click the little number.

"What did the discharge summary say about weight bearing, and does that conflict with anything in my assessment notes?"

Watch what happens when I click that little citation number. It jumps me straight to the sentence in the source. That is your safety net. You are never trusting a machine. You are trusting a document you already trusted, and using the machine to find the right page fast.

Configure Chat. This is the power move.

Click the **gear icon** in the chat panel and tell it who to be.

"You are an occupational therapist with 15 years of home modification experience. Answer in plain language a family member can understand at a 7th grade reading level. Always flag any safety concern first. Never recommend anything the sources do not support."

This is the single biggest upgrade you can make and almost nobody does it. You get up to five thousand characters here, which is about a page. Write it once per notebook and every answer from then on comes back in that voice, at that level, with your priorities. I have one saved in a text file that I paste into every clinical notebook I build.

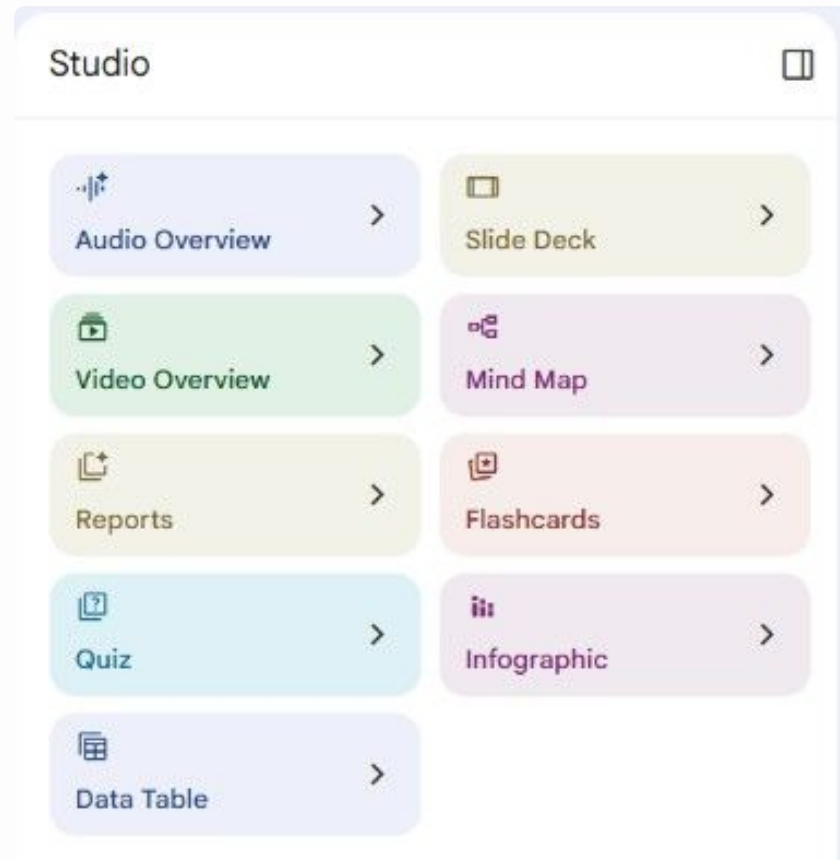
Note: **Where it is:** it's not in a settings menu anywhere, it's in the chat panel itself. Open your notebook, look at the **top of the middle pane** (the chat column). There's a small icon that looks like sliders or a gear. Click that to open the "Configure Chat" panel. Depending on which build you're on it may be labeled "Configure notebook" instead, it sits in the upper right corner of the middle pane.

The part that stops most people: the panel opens showing preset conversation goals, and there's no text box. You have to select "Custom" for the conversational goal first, then the free-text field appears. Paste your instructions in there and hit Save. If you're staring at a list of options and wondering where to type, that's why.

The Studio panel turns your sources into something new

This is where most of the magic lives, and it is the part people never scroll over to find.

Everything so far has been asking questions. Now we make things. This is where your Tuesday gets shorter.





Audio Overview: Two AI hosts discuss your documents like a podcast

Formats include Deep Dive, Brief, Critique and Debate

Available in 80+ languages

Interactive Mode lets you interrupt and ask a question mid-episode. Only works when creating a Deep Dive audio. Look for a small waving hand icon sitting next to the play button, not the play button itself. Clicking that opens Interactive Mode. Then press play, and while the audio is running, tap Join.

Just wanted to let you know that this feature is there but at this point it's still in Beta and doesn't really add any usable feature to the audio.

Audio files are downloadable and shareable

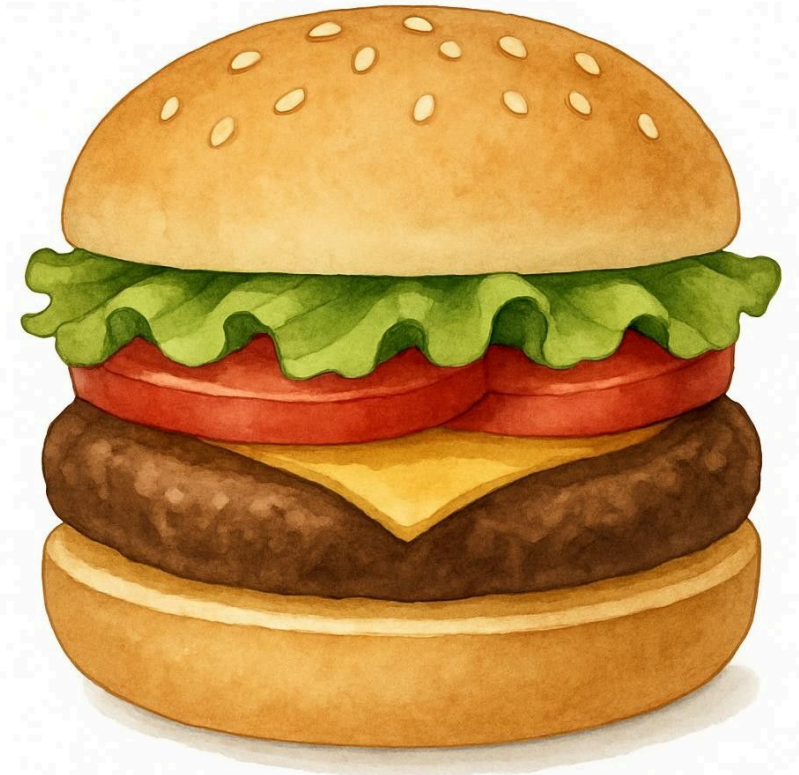
Video Overview: A narrated video built from your sources

Three options:
Cinematic
Explainer
Short

Visual styles: Classic,
Whiteboard, Watercolor,
Retro Print, Heritage, Paper-
craft, and more

You can steer it: *"Explain this to a family caregiver with no medical background"*

Three minutes of your time and you have a narrated video explaining a home modification plan. Think about what you currently pay a videographer, or more likely, think about the video you have never made because you were never going to make it.



Mind Map: A visual map of everything in your sources

Shows main topics and how they connect

Click any branch and it opens a chat about just that piece

If you are a visual thinker, start here instead of the chat. I use this when a family hands me a shoebox of paperwork and I need to see the shape of the situation before I know what to ask.



Quiz: Test your knowledge of your own documents

The Studio can generate an interactive quiz based entirely on the sources you uploaded — no outside knowledge, just what's in your files.

Auto-generated questions from your sources

Creates multiple-choice and true/false questions drawn directly from the documents you've uploaded — nothing fabricated.

Train staff and caregivers on your protocols

Great for onboarding or refreshing team members on your specific procedures and policies.

Prep before a client meeting

Quiz yourself on a client's file before you walk in the door — so the details are fresh and you show up ready.

Help clients and families retain information

Clients or family members can use the quiz to learn and remember care instructions at their own pace.

This turns passive reading into active learning — so the information actually sticks.

Data Table: Turns messy text into a sortable comparison table

Upload three contractor bids, get
one clean comparison

Upload eight product spec sheets,
get a feature grid

Exports straight to Google Sheets

This one is quietly the biggest time saver in the whole tool for our field. Comparison work is most of what we do and all of it is manual right now.



Reports: Offers up to 8 different formats

The 8 formats include Create Your Own, Briefing Doc, Study Guide and Blog Post. The additional 4 are customized according to the information you uploaded into Gemini Notebook. Slide

I want to be clear about what this is and is not. It is a first draft from your own material. It is not a finished piece with your name on it. You still write. It just means you never start from a blank page again.

Slide Deck: Presentation material, generated

Exports to PowerPoint

You can edit one slide at a time:
"fix slide 3, make it shorter"

Upload your brand guide as a source and tell it to match your colors and fonts

That last bullet is the trick. Put your logo file and your brand colors into the notebook as a source, then tell it to follow that guide. Your infographics come out on brand instead of looking like generic AI clip art.

Flashcards: Study tools built from your documents

Turns any source into self-test material

Works on the mobile app

Hold this one too. When we get to the client section I am going to show you what this does for a brand new family caregiver who has to learn a transfer technique by Thursday.



It goes and finds sources for you

01

In the source panel, choose **Web**, then either **Fast Research** or **Deep Research**

This solves the blank notebook problem. If you are starting on a topic where you do not have documents yet, this builds your starting library for you. Free plan gives you about ten of these per month, which is plenty.

02

It plans, searches, and writes a report with citations while you keep working

THE RULES YOU CANNOT IGNORE

Before you upload anything about a real person

A free personal Google account does **not** come with a HIPAA business associate agreement

If you are a covered entity, talk to your compliance person before uploading any protected health information

Google states that content you upload is not used to train its models, but that is a separate question from your own HIPAA obligations

I am going to be the person who says this out loud because a lot of AI trainings skip it. What Google does with your data and what your license requires of you are two different questions. Please get the second one answered by someone who knows your situation.

Four habits that keep you out of trouble

- 1 **De-identify.** "The client," not the name. Cover the header before you photograph it
- 2 **Get written permission** before building a notebook for a specific family
- 3 **Verify every citation** before it goes in a document with your signature on it
- 4 **You sign the report, not the AI.** Your clinical judgment is the product

Number four is the one I want you to remember. This tool is a very fast reader. It is not a clinician, it is not a contractor, and it has never met your client. You are still the professional in the room.

Honest limitations

It only knows what you gave it. It will not know your state's 2026 code change unless you upload the code change

It can still misread a table or a scanned page

It has no idea what Mrs. Ruiz's kitchen actually looks like

It cannot tell you whether a recommendation is clinically appropriate

If you ask it something your sources do not cover, it should tell you it does not know. That is the design. But check anyway.

The free plan is genuinely usable

	Free	Paid tiers
Notebooks	100	200 to 500
Sources per notebook	50	100 to 600
Chats per day	50	200 to 5,000
Audio Overviews per day	3	6 to 200
Deep Research	~10 per month	More

Paid access comes bundled with Google AI plans, starting around \$4.99 a month.

Start free. Genuinely. 50 sources in one notebook is a lot of documents. If you hit the limits, you will know exactly why you are upgrading.

YOUR HOMEWORK

Start small and practice with Gemini Notebook. I'm sure you'll end up loving it!

01

Go to notebook.google.com

02

Create a notebook and name it.

03

Add 5 documents you already have on your hard drive

04

Set your Configure Chat instruction

05

Ask it one question you have been guessing at