Adults Quick Guide

Printing or Saving Case Notes

Case notes can be printed or saved as a PDF document. You can create a PDF containing just one, all or a selection of the case notes on a record.

- Click **Case notes** in the sidebar menu of a person's record

- Click the **Print multiple case notes** button

- Select one, all, or a selection of case notes by ticking the appropriate checkboxes

If you have selected just one note or a specific selection, you can click the **Preview Selected** button to display the selected case notes before printing or saving the PDF document.

- Click the **Print** button - you can then choose to print or save your PDF of the case note(s). You should follow the secure printing policy when printing details from a person's record.

To save the PDF document or select a different printer to print to:

- Select as appropriate using the dropdown menu against the **Printer / Destination** field

Once you have selected an option, this will default in each time you wish to save or print case notes until you change it.

Note: If the option 'Save as PDF' does not work you can select 'Microsoft Print to PDF' – you may then have to open your downloads folder to find the document if it does not ask you where you wish to save it.

- Click the **Save** button - you will then be prompted to choose where you would like the document to save on your computer.

Or if you are just printing the PDF document;

- Click the **Print** button