

## ORGANMATCH NOTES AND ATTACHMENTS- TRANSPLANTATION PORTAL

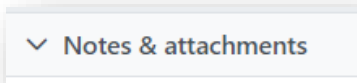
A note can be added to a person record in the OrganMatch Transplantation Portal to attach relevant information that the Tissue Typing laboratories need to access. When a note is added through the Transplantation Portal, the system generates a notification to the Laboratory Portal, so they know to action the note. A notification is also generated to the Transplantation Portal if a note is added through the Laboratory Portal. Users can also reply to these notes but cannot edit them.

The **Notes & attachments** section has a current and history tab where active notes appear in the current tab and archived notes appear in the history tab.

Last Updated On	Last Updated By	Created In	Sub-category	Title	Details	Total No. of Attachments	Has Attachments
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## VIEWING NOTES AND ATTACHMENTS

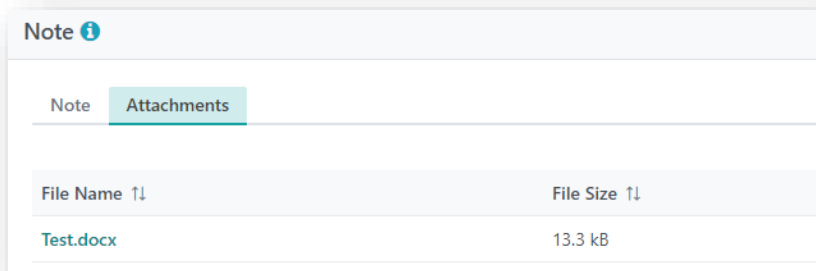
1. On the person's profile in OM, select the **Notes & attachments** tab.



2. Click on the note to be viewed.

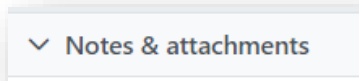
Last Updated On	Last Updated By	Created In	Sub-category	Title	Details	Total No. of Attachments	Has Attachments
31/05/2023	Rebecca Scammell	Lab	Samples & test results	Testing notes	Testing notes	0	<a href="#">Reply</a>

- To access any attachments, click the **Attachments** tab and click the link under file name. The file will download in the bottom left corner.

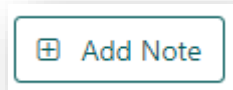


## ADDING A NOTE AND ATTACHMENT

- On the person's profile in OM, select the **Notes & attachments** tab.



- Click **Add note**.



- Fill in the required fields of **Title** and **Details** and select the **Sub-Category** from the dropdown. The **Category** defaults to **Person**. The **Category Person-ANZKX** applies to notes that can only be viewed by the ANZKX team.

**Note:** When uploading an ABO report select the **Sub-Category ABO Forms**.

The 'Add Note' dialog box has a close button (X) in the top right corner. It features two tabs: 'Note' (selected) and 'Attachments'. Below the tabs is a 'Title \*' text input field. Underneath are two dropdown menus: 'Category \*' with 'Person' selected, and 'Sub-Category \*' with 'Please Select...' selected. A 'Details \*' section contains a rich text editor with icons for Bold (B), Italic (I), Underline (U), Bulleted List, and Numbered List. The text area contains the placeholder 'Enter text here...'. At the bottom right are 'Cancel' and 'Save' buttons.

- To upload an attachment, click the **Attachments** tab. Drag and drop the file or click **Select a file** to upload the document from the computer.

The 'Add Note' dialog box has the 'Attachments' tab selected. It shows a '+ Select a file' button in a teal box. Below this is a document icon and the text 'or Drag a file here'. At the bottom, there is a table header with 'File Name ↑↓', 'File Size ↑↓', and a 'Delete' button with a trash icon. The table body contains the text 'No records found'.

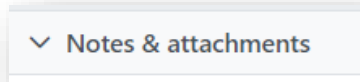
- Click **Save**.

A close-up of the 'Cancel' and 'Save' buttons. The 'Cancel' button is white with a grey border, and the 'Save' button is teal with white text.

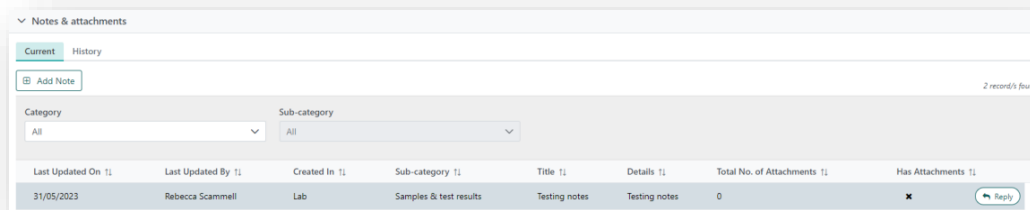
## EDITING OR DELETING A NOTE OR ATTACHMENT

Users can edit any note created in the Transplantation Portal but can only delete the notes they created.

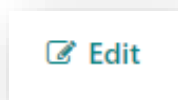
1. On the person's profile in OM, select the **Notes & attachments** tab.



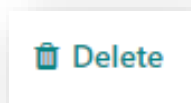
2. Click on the note to be edited or deleted.



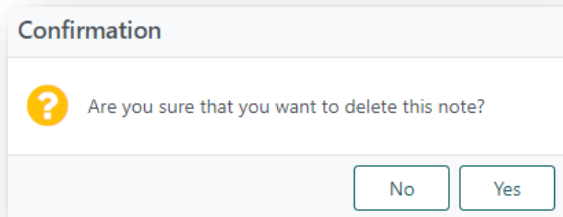
3. Click **Edit**. Update the note as required and click **Save**.



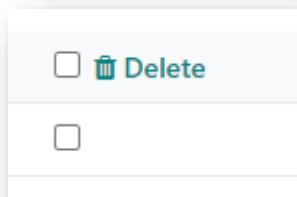
4. If the note requires deleting, click **Edit** and the button then changes to **Delete**.



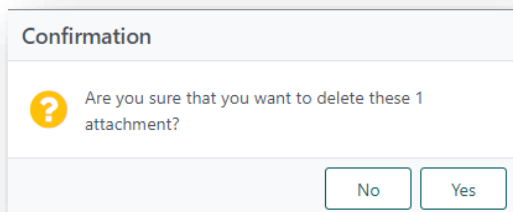
5. Click **Yes**.



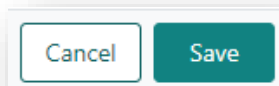
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6. To delete an attachment select the check box next to the attachment and click **Delete**.



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7. Click **Yes**.

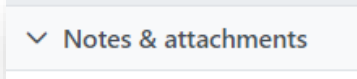


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8. Click **Save**.



## REPLYING TO A NOTE

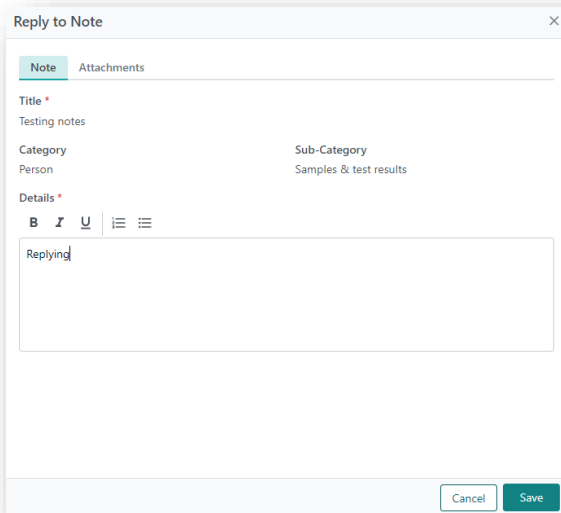
1. On the person's profile in OM, select the **Notes & attachments** tab.



2. Click **Reply** on the relevant note.



3. Add **Details** and click **Save**.

A screenshot of a "Reply to Note" dialog box. The dialog has a title bar with a close button (X). Below the title bar are two tabs: "Note" (selected) and "Attachments". The "Note" tab contains a "Title \*" field with the text "Testing notes". Below the title are two columns: "Category" with the value "Person" and "Sub-Category" with the value "Samples & test results". Below these is a "Details \*" section with a rich text editor toolbar containing icons for Bold (B), Italic (I), Underline (U), Bulleted List, and Numbered List. The text area below the toolbar contains the word "Replying". At the bottom right of the dialog are "Cancel" and "Save" buttons.

## CHANGE HISTORY

Version number	Effective date	Summary of change
1	Refer to Footer	New version of document

## ELECTRONIC SIGNATURE

Author	REBECCA SCAMMELL
Approver(s)	NARELLE WATSON