A note can be added to a person record in OrganMatch in the **Notes & attachments** section. Notes allow users to attach relevant information for the person or to include information on a report. When a note is added through the Transplantation or Donation Portals, the system generates a notification to the Laboratory Portal. A notification is also generated to the Transplantation Portal if a note is added through the Laboratory Portal and the **Internal Note** is selected as No. Users can reply to these notes from the Transplantation or Donation Portals.

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. Users can filter notes by the **Sub-category** or can sort the notes by clicking on headings in the list table.
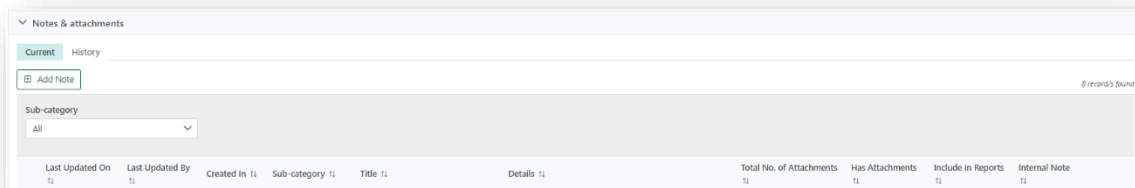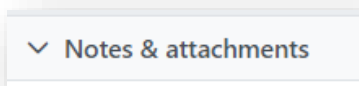

Notes can also be viewed in specific sections depending on their categorisation. For example, when attaching an ABO report to a note, the **Sub-category** ABO forms is selected. This note can then be viewed in Samples & tests results by clicking View Notes in the Blood group tab.
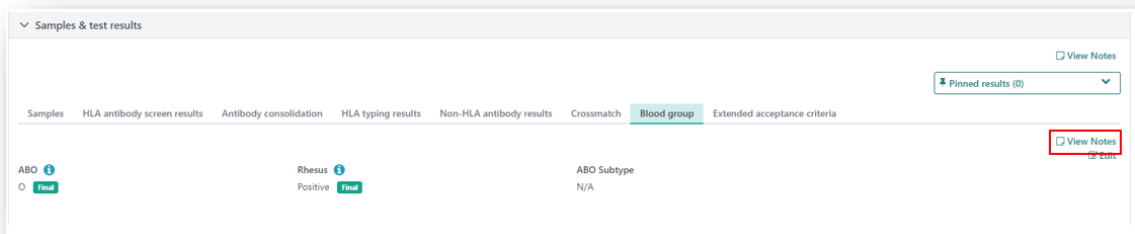
1. VIEWING NOTES AND ATTACHMENTS

1.1 VIEWING A NOTE IN THE PERSON PROFILE

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

2. Click on the note to be viewed.

To access any attachments, click the **Attachments** tab and click the link under file name.
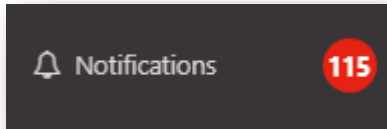

3. Access the file from downloads in the menu bar.
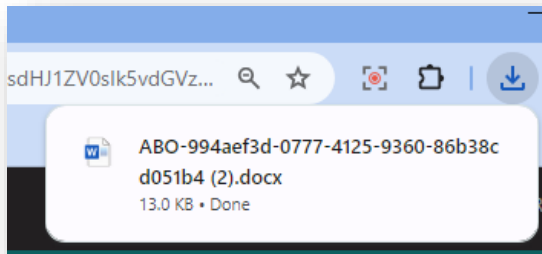
1.2 VIEWING A NOTE FROM THE NOTIFICATIONS PAGE

If a note is added from the Transplantation or Donation portal, a notification is generated. The note can be viewed from the notifications page by hovering over the notification.
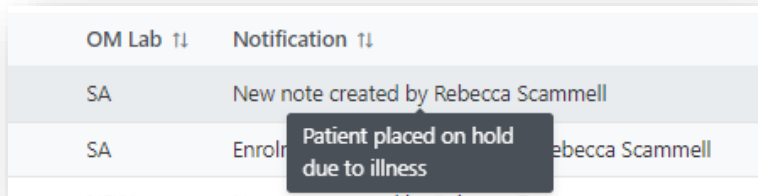
1. Select the **Notifications** menu.

2. Find the notification for a New note created.

3. Hover over the notification column to display the note.

4. Clicking on the notification navigates to the Person Profile with the **Notes & attachments** tab expanded to view the note.
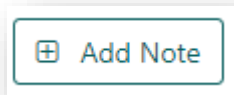
2. ADDING A NOTE AND ATTACHMENT

When adding a note up to five attachments can be included in one note. The attachments must be less than 2MB in size.

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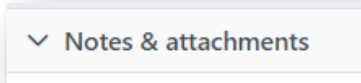
2. Click **Add note**.

3. Fill in the required fields of **Title** and **Details** and select the **Sub-Catgeory** from the dropdown. The **Category** defaults to **Person**.
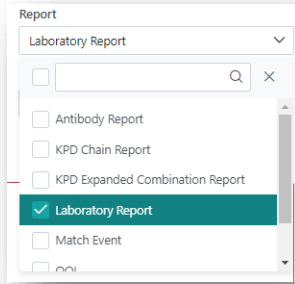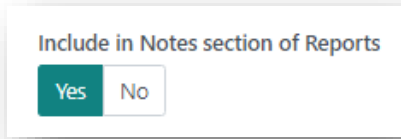
**Note:** When uploading an ABO report select the **Sub-Category ABO Forms**.

4. Select **Yes** for **Include in Notes section of Reports** to include the note on a report. Select the type of report from the **Report** dropdown.
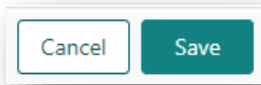

5. **Internal Note** defaults to **Yes** meaning notes cannot be viewed in the Trasplantation or Donation portals. Select **No** for **Internal Note** to allow these notes to be viewed in the other portals.
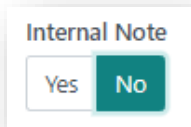
6. To upload an attachment, click the **Attachments** tab. Drag and drop the file or click **Select a file** to upload the document from the computer.
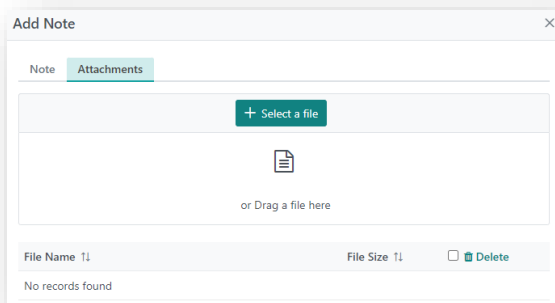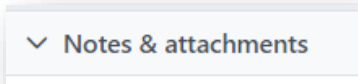
7. Click **Save.**

3. EDITING OR DELETING A NOTE OR ATTACHMENT

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

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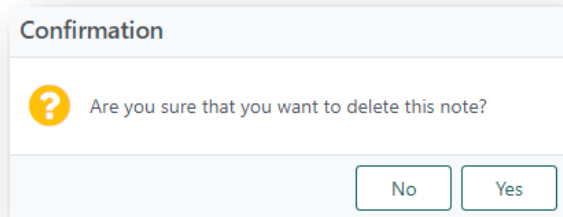

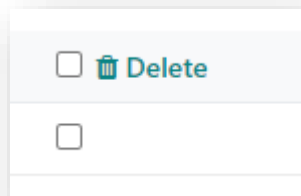3. Click **Edit**. Update the note as required and click **Save**.

4. If the note requires deleting, click **Edit** and the button then changes to **Archive** or **Delete**. Click **Delete**.
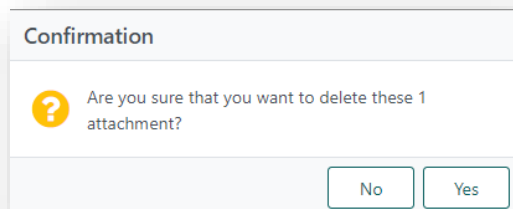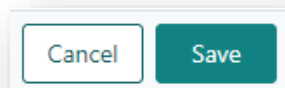
5. Click **Yes**.

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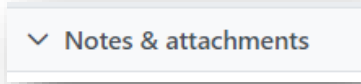

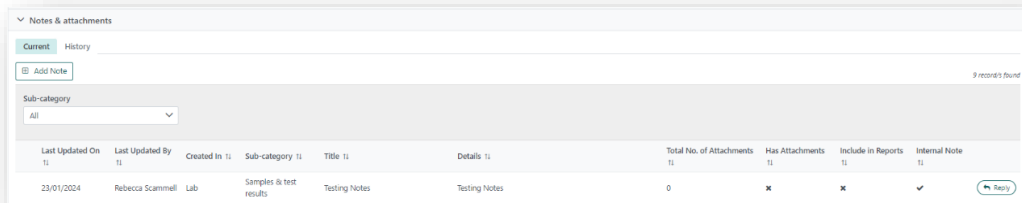7. Click **Yes**.

8. Click **Save**.
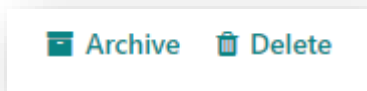
4. ARCHIVING AND UNARCHIVING A NOTE

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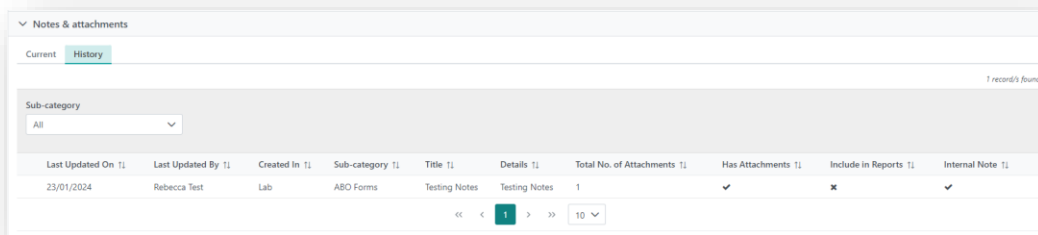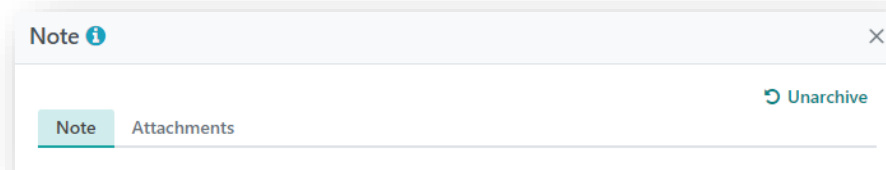

2. Click on the note to be archived.

3. Click **Edit** and the button then changes to **Archive** or **Delete**. Click **Archive**.

4. The note will then be moved to the history tab and cannot be modified.

5. To unarchive the note, click on the note in the **History** tab and click **Unarchive**. The note will be returned to the current tab.
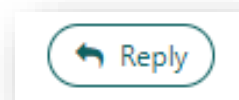

Note: A note cannot be archived if it is selected to be included in the notes section of a report.

5. REPLYING TO A NOTE

1. On the person's profile in OM, select the **Notes & attachments** tab.
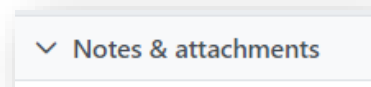
2. Click **Reply** on the relevant note.

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

4.   Once saved a child note is created with the reply and this is appended to the original parent note. Click on the green arrow of the parent note to view the reply.

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