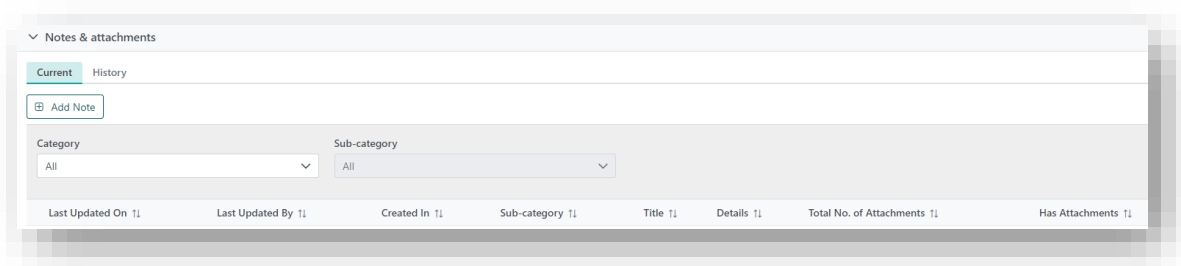


ORGANMATCH NOTES AND ATTACHMENTS- TRANSPLANTATION PORTAL

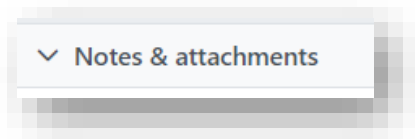
A note can be added to a person record in the OrganMatch Transplantation Portal to attach relevant information that the Tissue Typing laboratories need to access. When a note is added through the Transplantation Portal, the system generates a notification to the Laboratory Portal, so they know to action 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.

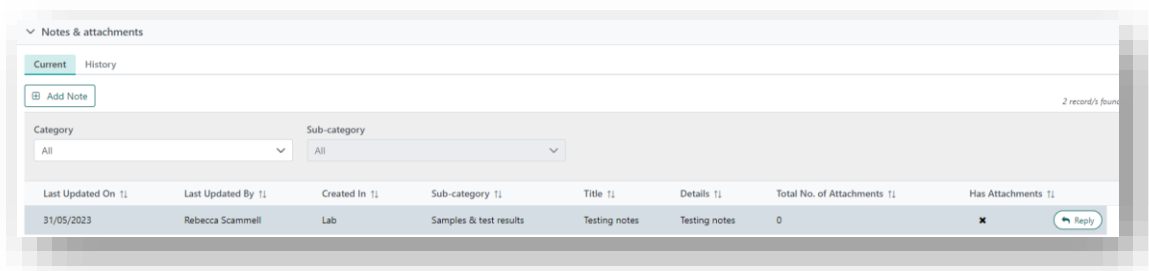


VIEWING NOTES AND ATTACHMENTS

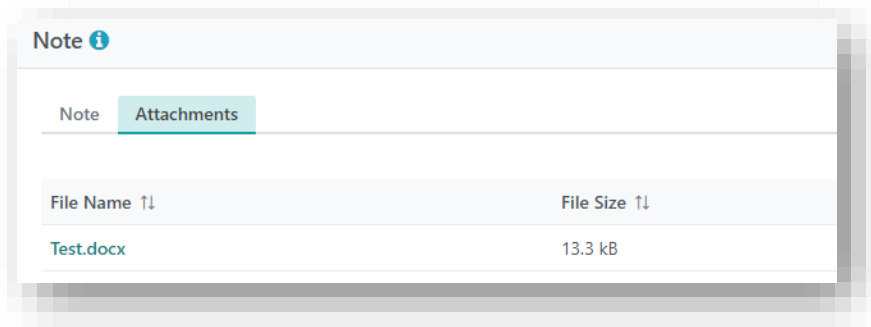
1. On the person's profile in OM, select the **Notes & attachments** tab.



2. Click on the note to be viewed.

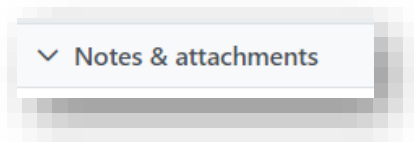


- To access any attachments, click the **Attachments** tab and click the link under file name. The file can then be accessed from the download menu in the top right-hand corner.

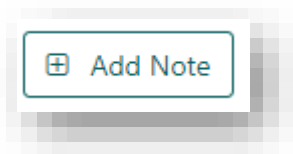


ADDING A NOTE AND ATTACHMENT

- 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 is shown with the 'Note' tab selected. It contains the following elements:

- Title ***: A text input field.
- Category ***: A dropdown menu with 'Person' selected.
- Sub-Category ***: A dropdown menu with 'Please Select...' selected.
- Details ***: A section with text formatting icons (Bold, Italic, Underline, Bulleted List, Numbered List) and a large text area containing the placeholder 'Enter text here...'.
- Buttons**: 'Cancel' and 'Save' buttons at the bottom right.

- 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.

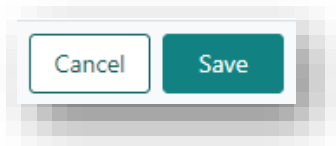
Note: Attachments can be uploaded in the file format of .xls, .xlsx, .doc, .docx, .pdf, .xml, .png, .bmp, .jpg, .jpeg, .txt, .csv, .xlsm.

The 'Add Note' dialog box is shown with the 'Attachments' tab selected. It contains the following elements:

- + Select a file**: A button to initiate file selection.
- Document icon**: A simple icon representing a file.
- or Drag a file here**: Text indicating that files can be dragged into the area.
- Table**: A table with the following structure:

File Name	File Size	<input type="checkbox"/> Delete
No records found		

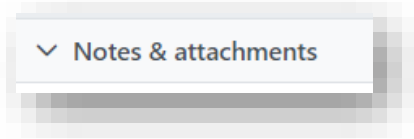
- Click **Save**.



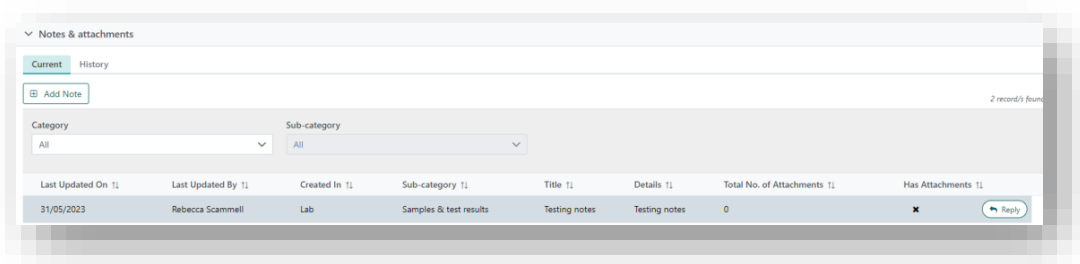
EDITING OR DELETING A NOTE OR ATTACHMENT

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

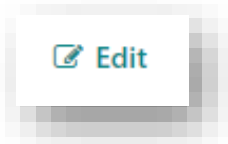
1. On the person's profile in OM, select the **Notes & attachments** tab.



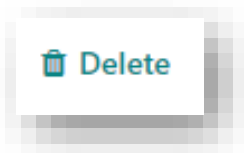
2. Click on the note to be edited or deleted.



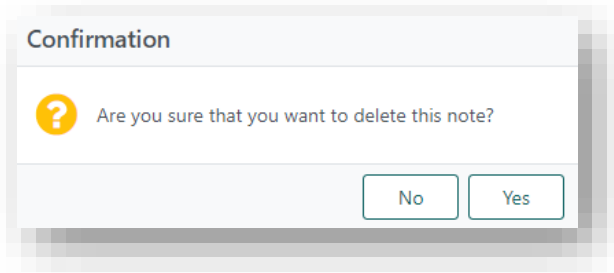
3. Click **Edit**. Update the note as required and click **Save**.



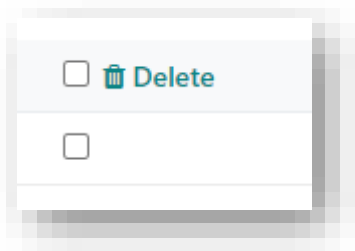
4. If the note requires deleting, click **Edit** and the button then changes to **Delete**.



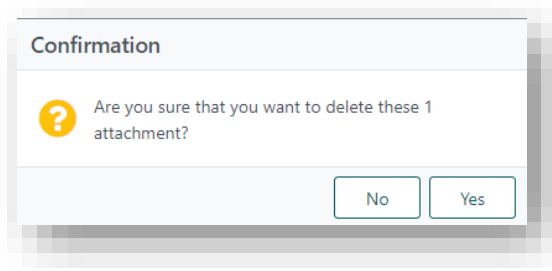
5. Click **Yes**.



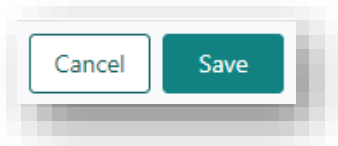
6. To delete an attachment select the check box next to the attachment and click **Delete**.



7. Click **Yes**.

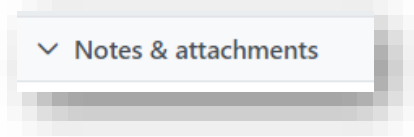


8. Click **Save**.

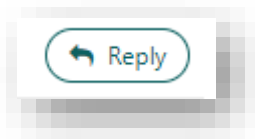


REPLYING TO A NOTE

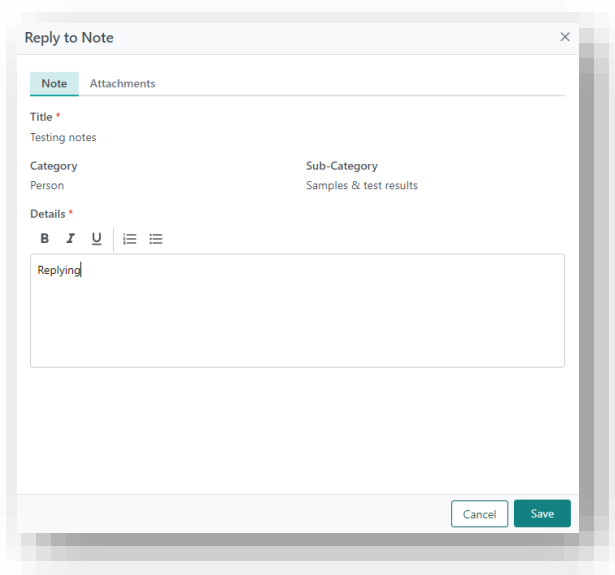
1. On the person's profile in OM, select the **Notes & attachments** tab.



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



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



CHANGE HISTORY

Version number	Effective date	Summary of change
1	08/08/2023	New version of document
2	Refer to Footer	<ul style="list-style-type: none">• Annual document review• Addition of attachment file format to section for adding a note and attachment.• Update for download location in the section for viewing notes and attachments.

ELECTRONIC SIGNATURE

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