

## 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.

Notes & attachments

Current History

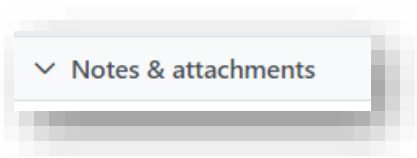
Add Note

Category: All Sub-category: All

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.

Notes & attachments

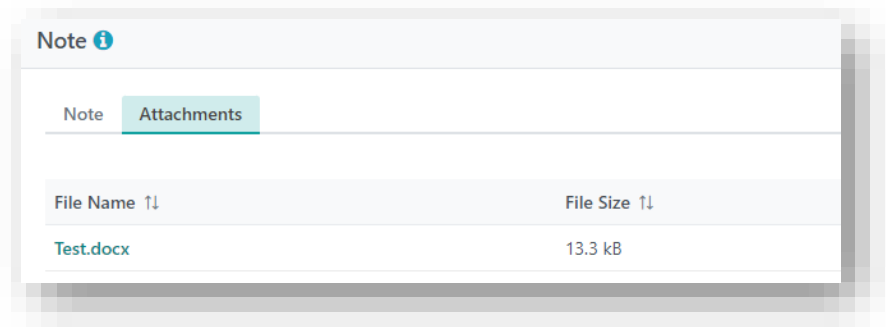
Current History

Add Note

Category: All Sub-category: All

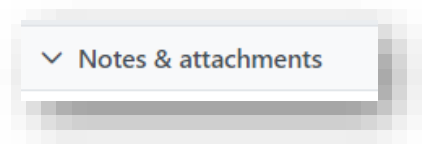
Last Updated On	Last Updated By	Created In	Sub-category	Title	Details	Total No. of Attachments	Has Attachments
31/05/2023	Rebecca Scammell	Lab	Samples & test results	Testing notes	Testing notes	0	X

- 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.

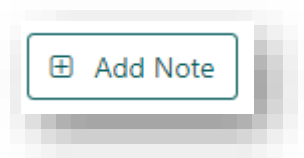


## ADDING A NOTE AND ATTACHMENT

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

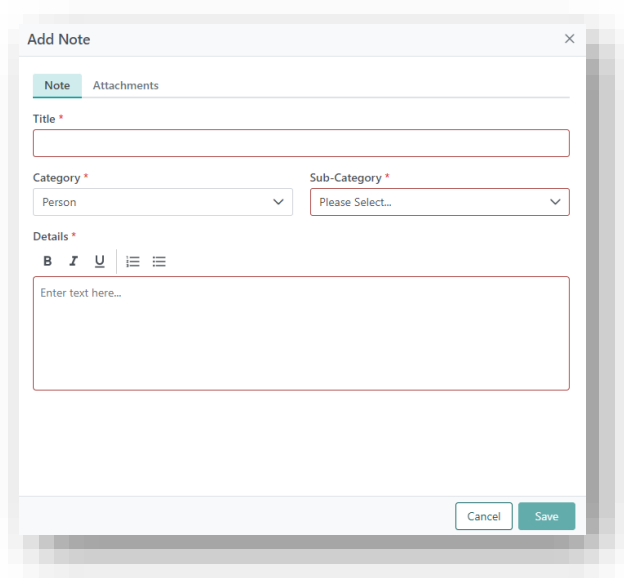


- Click **Add note**.



- Fill in the required fields of **Title** and **Details** and select the **Sub-Catgeory** from the dropdown. The **Category** defaults to **Person**. The **Category Person-ANZKX** applies to notes that can only be viewed by the ANZKX team and laboratory portal users with the KPD National Lab Coordinator and Senior User roles.

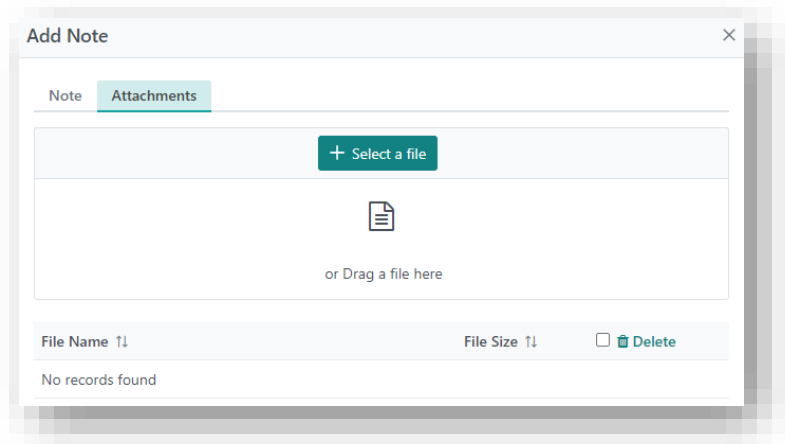
**Note:** When uploading an ABO report select the **Sub-Category ABO Forms**.



The 'Add Note' dialog box has a title bar with a close button. It contains two tabs: 'Note' (selected) and 'Attachments'. The 'Note' tab has a 'Title \*' field, a 'Category \*' dropdown menu with 'Person' selected, a 'Sub-Category \*' dropdown menu with 'Please Select...' selected, and a 'Details \*' section with a rich text editor (B, I, U, bulleted list, numbered list) and a text area with the placeholder 'Enter text here...'. At the bottom are 'Cancel' and 'Save' buttons.

4. 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.

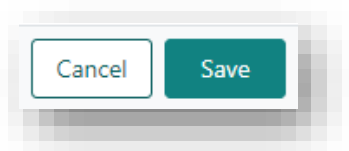
**Note:** Attachments can be uploaded in the file format of .xls, .xlsx, .doc, .docx, .pdf, .xml, .png, .bmp, .jpg, .jpeg, .txt, .csv, .xlsm.



The 'Add Note' dialog box has the 'Attachments' tab selected. It shows a '+ Select a file' button, a document icon, and the text 'or Drag a file here'. Below this is a table with columns 'File Name', 'File Size', and a 'Delete' button. The table is currently empty, showing 'No records found'.

File Name	File Size	Delete
No records found		

5. Click **Save**.

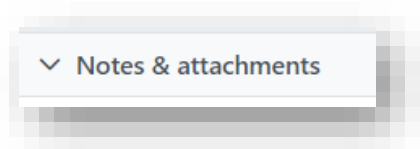


A close-up of the 'Cancel' and 'Save' buttons at the bottom of the dialog box. The 'Save' button is highlighted in green.

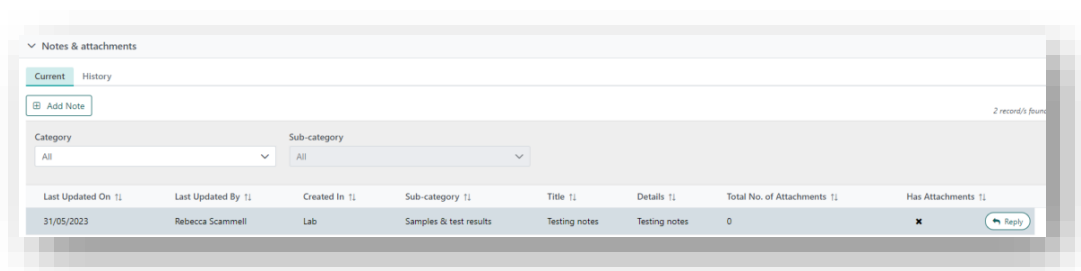
## EDITING OR DELETING A NOTE OR ATTACHMENT

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

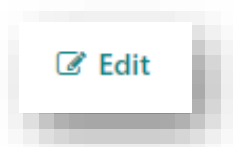
1. On the person's profile in OM, select the **Notes & attachments** tab.



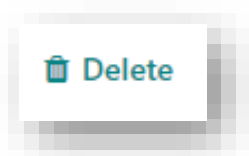
2. Click on the note to be edited or deleted.



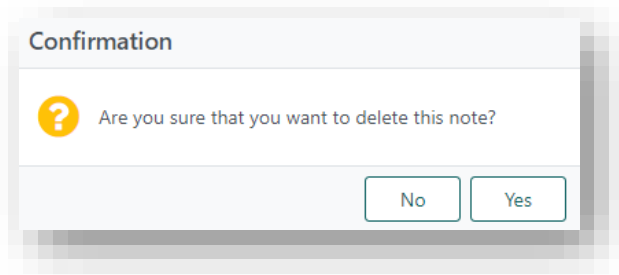
3. Click **Edit**. Update the note as required and click **Save**.



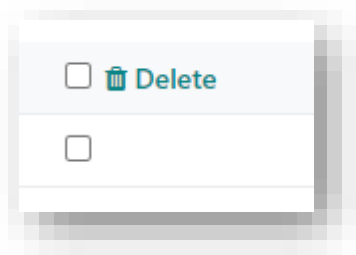
4. If the note requires deleting, click **Edit** and the button then changes to **Delete**.



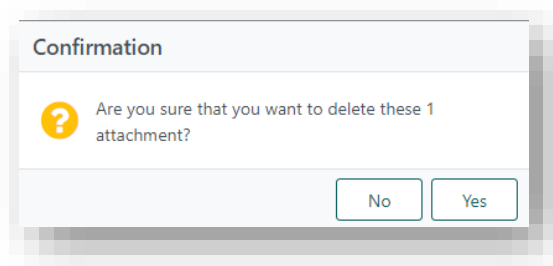
5. Click **Yes**.



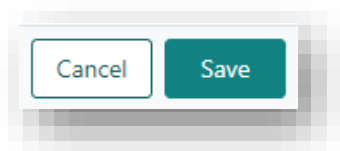
6. To delete an attachment select the check box next to the attachment and click **Delete**.



7. Click **Yes**.

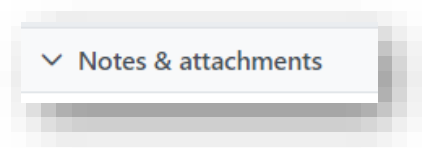


8. Click **Save**.

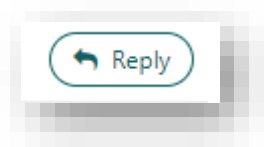


## REPLYING TO A NOTE

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**.

A screenshot of a 'Reply to Note' dialog box. The dialog has a title bar with a close button (X). Inside, there are two tabs: 'Note' (selected) and 'Attachments'. Under the 'Note' tab, there is a 'Title' field with a red asterisk, containing the text 'Testing notes'. Below this is a 'Category' dropdown menu set to 'Person' and a 'Sub-Category' dropdown menu set to 'Samples & test results'. There is a 'Details' section with a rich text editor containing the word 'Replying'. The rich text editor has icons for bold (B), italic (I), underline (U), bulleted list, and numbered list. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

## CHANGE HISTORY

Version number	Effective date	Summary of change
1	08/08/2023	New version of document
2	23/01/2025	<ul style="list-style-type: none"><li>Annual document review</li><li>Addition of attachment file format to section for adding a note and attachment.</li><li>Update for download location in the section for viewing notes and attachments.</li></ul>
3	Refer to footer	<p>Sprint 57 updates:</p> <ul style="list-style-type: none"><li>Section 1 updated for Person- ANZKX notes.</li></ul>

## ELECTRONIC SIGNATURE

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