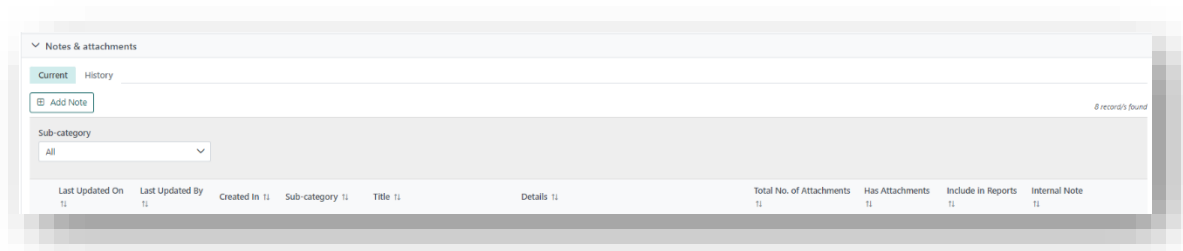
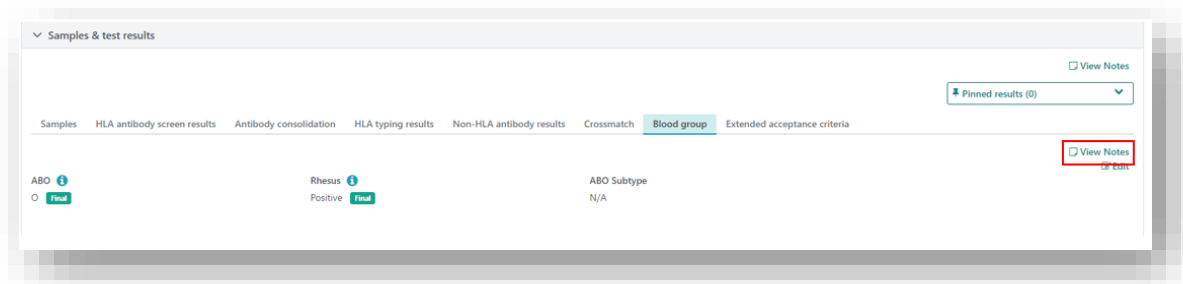


A note can be added to a person record in OrganMatch in the **Notes & attachments** section. Notes allow users to attach relevant information for the person or to include information on a report. When a note is added through the Transplantation or Donation Portals, the system generates a notification 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. The **Category Person-ANZKX** applies to notes that can only be viewed by the ANZKX team.



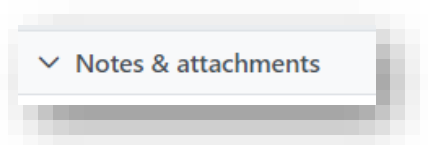
Notes can also be viewed in specific sections depending on their categorisation. For example, when attaching an ABO report to a note, the **Sub-category** ABO forms is selected. This note can then be viewed in Samples & tests results by clicking View Notes in the Blood group tab.



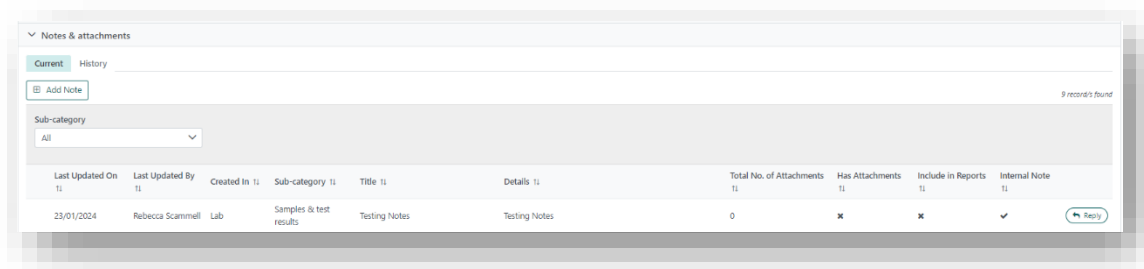
## 1. VIEWING NOTES AND ATTACHMENTS

### 1.1 VIEWING A NOTE IN THE PERSON PROFILE

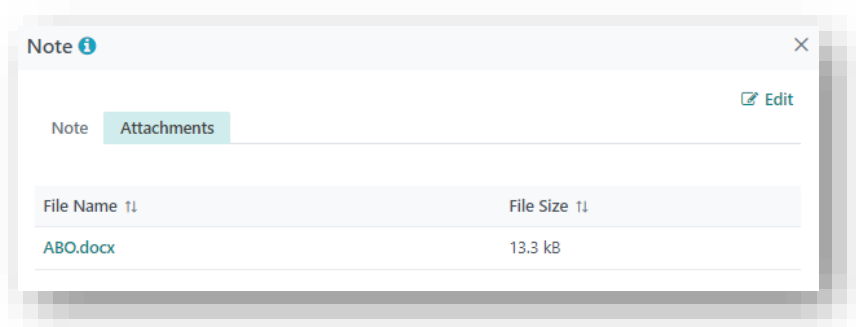
- On the person's profile in OM, select the **Notes & attachments** tab.



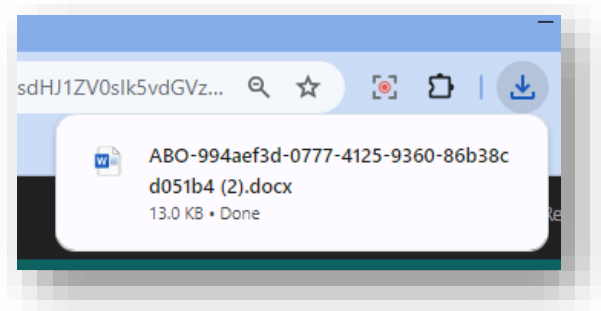
- Click on the note to be viewed.



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



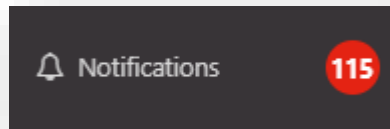
- Access the file from downloads in the menu bar.



## 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.

Current		History						
Last Name	First Name	TWL Status	Last Updated On	Last Updated By	Created In	User Role	OM Lab	Notification
dOscQhTo	Wmidy	On Hold	13/03/2024 13:36	Rebecca Scammell	Transplantation	LAB USER	SA	New note created by Rebecca Scammell

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

OM Lab	Notification
SA	New note created by Rebecca Scammell
SA	Enrolment placed on hold due to illness by Rebecca Scammell

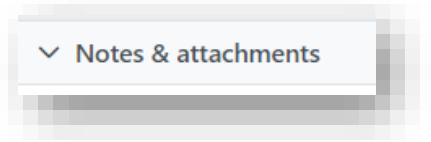
4. Clicking on the notification navigates to the Person Profile with the **Notes & attachments** tab expanded to view the note.

Notes & attachments									
Current		History							
Add Note									
Sub-category		All							
Last Updated On	Last Updated By	Created In	Sub-category	Title	Details	Total No. of Attachments	Has Attachments	Include in Reports	Internal Note
13/03/2024	Rebecca Scammell	Transplantation	Program enrolments	Patient On Hold	Patient placed on hold due to illness	0	✖	✖	✖

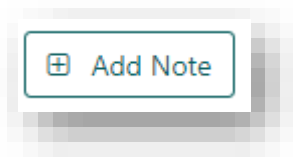
## 2. ADDING A NOTE AND ATTACHMENT

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**.

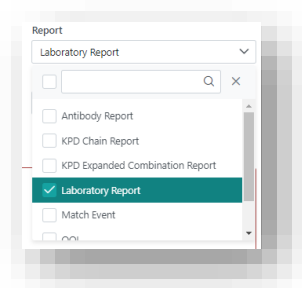
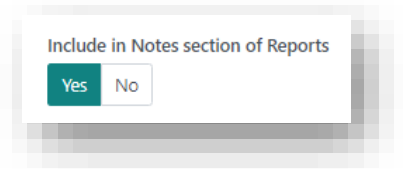


3. Fill in the required fields of **Title** and **Details** and select the **Sub-Catgeory** from the dropdown. The **Category** defaults to **Person**. The **Category Person-ANZKX** applies to notes that can only be viewed by the ANZKX team.

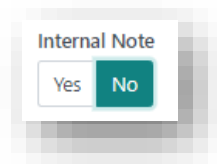
**Note:** When uploading an ABO report select the **Sub-Category ABO Forms**.

A screenshot of a 'Add Note' form. The form has a title bar with a close button (X). Below the title bar are two tabs: 'Note' (selected) and 'Attachments'. The form contains several fields: 'Title \*' (text input), 'Category' (dropdown menu with 'Person' selected), 'Sub-Category \*' (dropdown menu with 'Please Select...' selected), 'Include in Notes section of Reports' (radio buttons for 'Yes' and 'No', with 'No' selected), 'Internal Note' (radio buttons for 'Yes' and 'No', with 'Yes' selected), 'Include in Match Event' (radio buttons for 'Yes' and 'No', with 'No' selected), and 'Details \*' (text input with a rich text editor toolbar above it). At the bottom right are 'Cancel' and 'Save' buttons.

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.

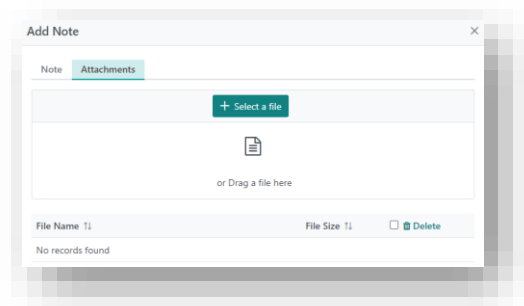


5. **Internal Note** defaults to **Yes** meaning notes cannot be viewed in the Transplantation or Donation portals. Select **No** for **Internal Note** to allow these notes to be viewed in the other portals.

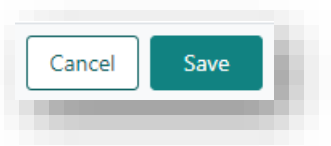


6. To upload an attachment, click the **Attachments** tab. Drag and drop the file or click **Select a file** to upload the document from the computer.

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

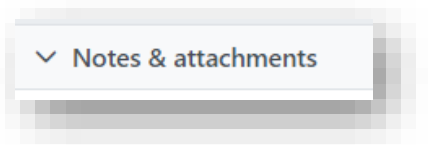


7. Click **Save**.

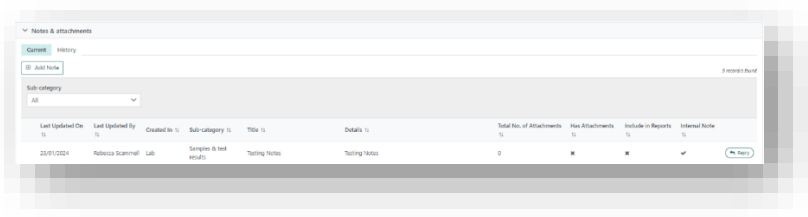


3. EDITING OR DELETING A NOTE OR ATTACHMENT

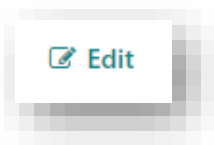
1. On the person’s profile in OM, select the **Notes & attachments** tab.



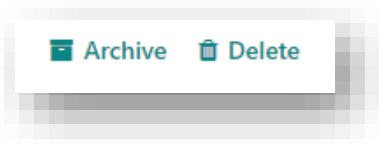
2. Click on the note to be edited or deleted.



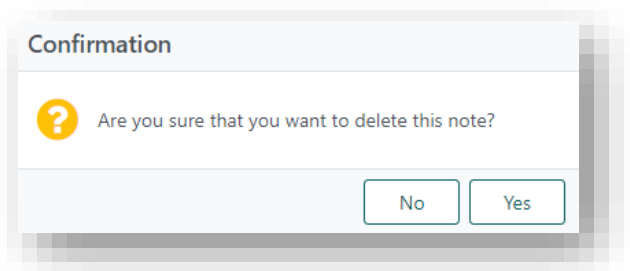
3. Click **Edit**. Update the note as required and click **Save**.



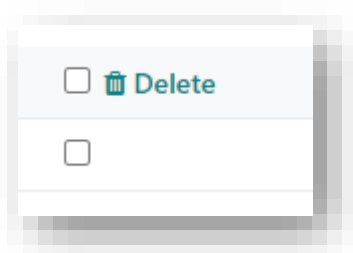
4. If the note requires deleting, click **Edit** and the button then changes to **Archive** or **Delete**. Click **Delete**.



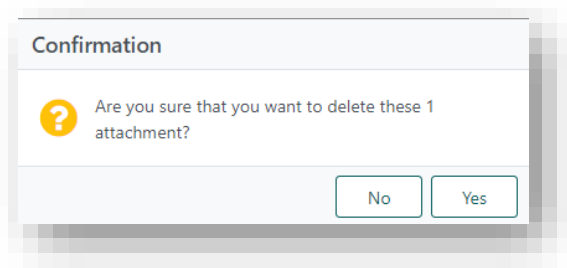
5. Click **Yes**.



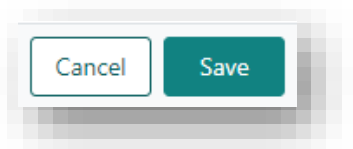
6. To delete an attachment select the check box next to the attachment and click **Delete**.



7. Click **Yes**.

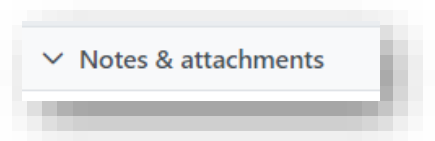


8. Click **Save**.

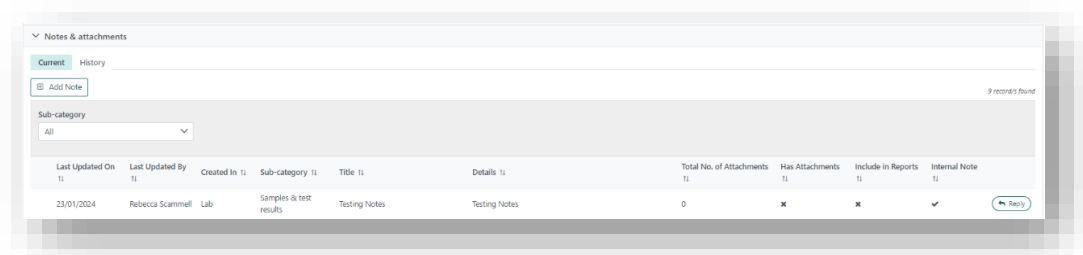


#### 4. ARCHIVING AND UNARCHIVING A NOTE

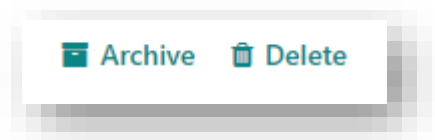
1. On the person's profile in OM, select the **Notes & attachments** tab.



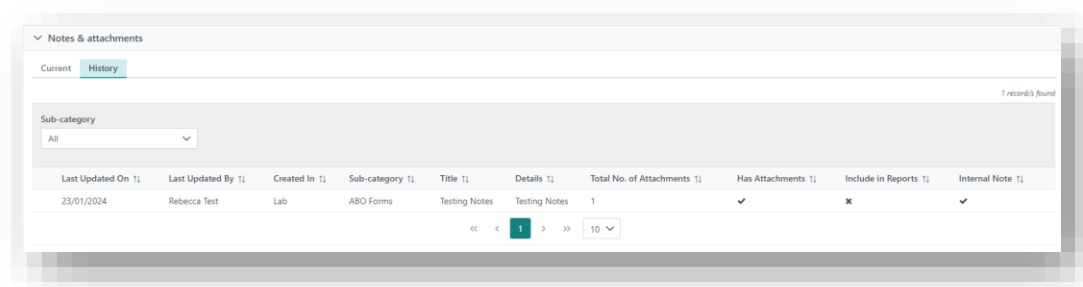
2. Click on the note to be archived.



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

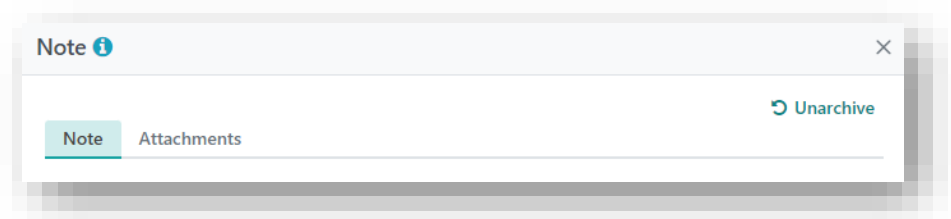


4. The note will then be moved to the history tab and cannot be modified.





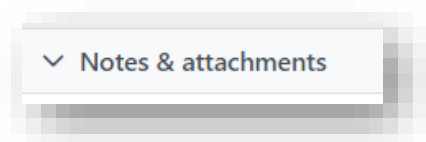
- To unarchive the note, click on the note in the **History** tab and click **Unarchive**. The note will be returned to the current tab.



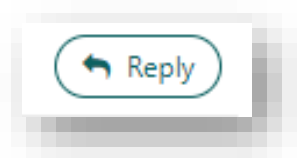
**Note:** A note cannot be archived if it is selected to be included in the notes section of a report.

## 5. REPLYING TO A NOTE

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



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



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

Reply to Note

Note

Attachments

Title \*

Antibody Screening\_sample date 02/11/2023

Category

Person

Sub-Category

Samples & test results

Include in Notes section of Reports

No

Internal Note

No

Details \*

B

I

U

U

U

U

Enter text here...

Cancel

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.

Notes & attachments

Current

History

Add Note

9 record/s found

Sub-category

All

Last Updated On Tl	Last Updated By Tl	Created In Tl	Sub-category Tl	Title Tl	Details Tl	Total No. of Attachments Tl	Has Attachments Tl	Include in Reports Tl	Internal Note Tl	
23/01/2024	Rebecca Test	Lab	Samples & test results	Antibody Screening_sample date 02/11/2023	ANTIBODY REVIEW: Patient's antibodies have been re...	0	x	x	x	<div>Reply</div>
23/01/2024	Rebecca Test	Lab	Samples & test results	Antibody Screening_sample date 02/11/2023	Replying		x	x	x	

## CHANGE HISTORY

Version number	Effective date	Summary of change
1	03/04/2024	New version of document
2	27/05/2025	Sprint 57 updates: <ul style="list-style-type: none"><li>Section 2 updated for Person- ANZKX notes.</li></ul> Other: <ul style="list-style-type: none"><li>Annual review.</li><li>Addition of attachment file format to section 2.</li></ul>
3	Refer to footer	Sprint 58 updates: <ul style="list-style-type: none"><li>Section 2 updated to remove functionality of viewing a Person-ANZKX note in the lab portal.</li></ul>

## ELECTRONIC SIGNATURE

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Approver(s)	NARELLE WATSON