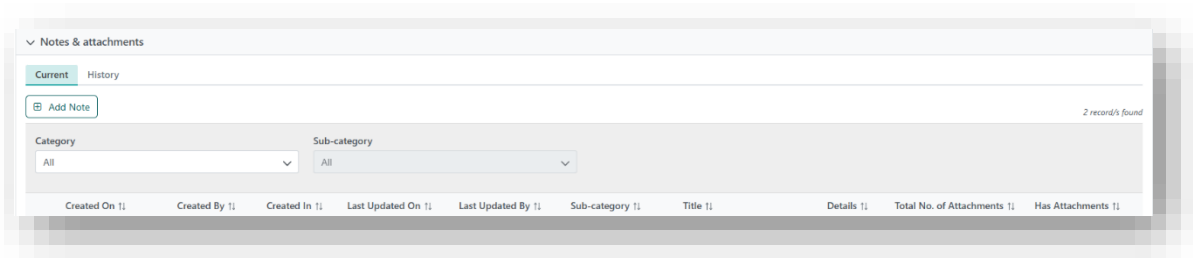


## ORGANMATCH NOTES AND ATTACHMENTS- TRANSPLANTATION PORTAL

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.

All notes include date and time stamps, along with information about the user who created and most recently updated each note.

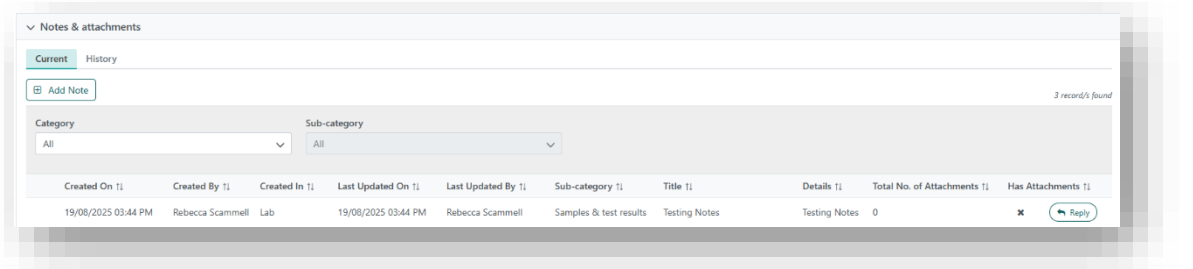


## VIEWING NOTES AND ATTACHMENTS

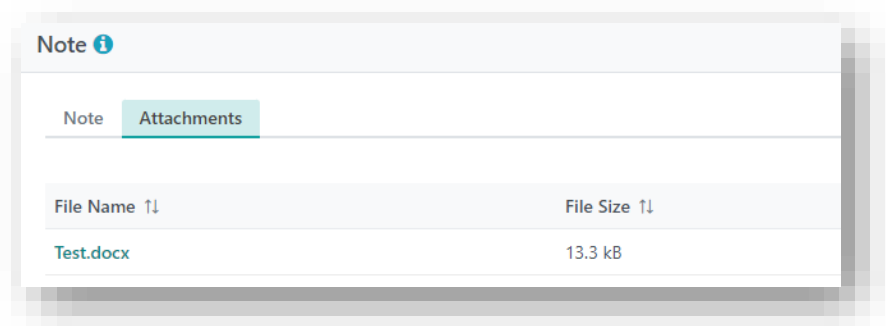
1. On the person's profile in OM, select the **Notes & attachments** tab.



2. Click on the note to be viewed.

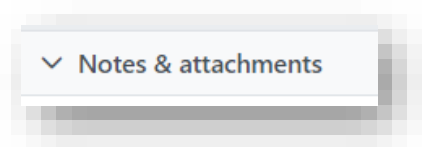


- To access any attachments, click the **Attachments** tab and click the link under file name. The file can then be accessed from the download menu in the top right-hand corner.

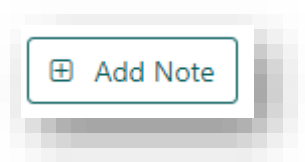


## ADDING A NOTE AND ATTACHMENT

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

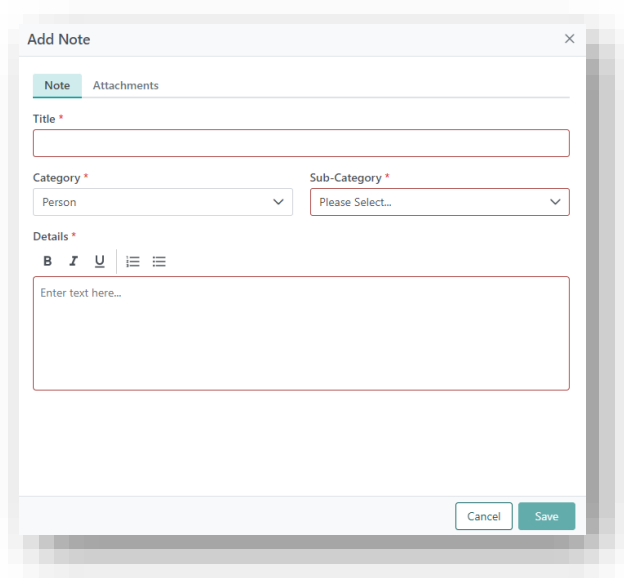


- Click **Add note**.



- Fill in the required fields of **Title** and **Details** and select the **Sub-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.

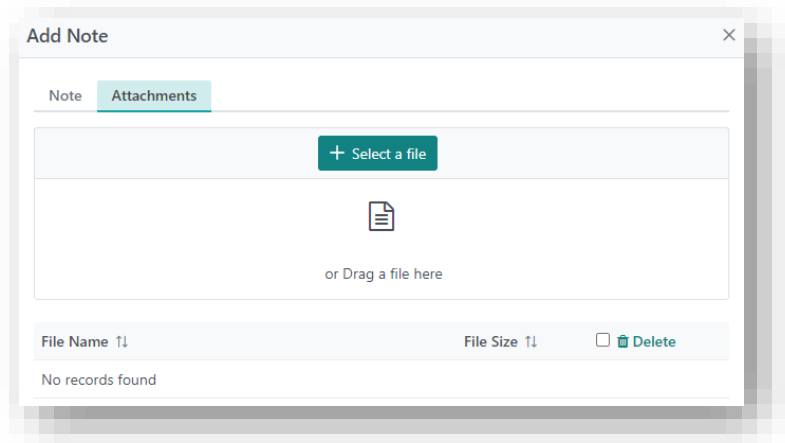
**Note:** When uploading an ABO report select the **Sub-Category ABO Forms**.



The 'Add Note' dialog box has a close button (X) in the top right corner. It features two tabs: 'Note' (selected) and 'Attachments'. The 'Note' tab contains a 'Title \*' text field, a 'Category \*' dropdown menu with 'Person' selected, and a 'Sub-Category \*' dropdown menu with 'Please Select...' selected. Below these is a 'Details \*' section with a rich text editor showing 'Enter text here...' and icons for bold (B), italic (I), underline (U), bulleted list, and numbered list. At the bottom are 'Cancel' and 'Save' buttons.

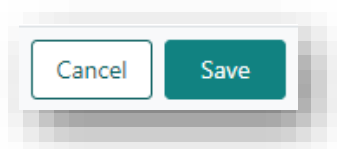
4. To upload an attachment, click the **Attachments** tab.  
Drag and drop the file or click **Select a file** to upload the document from the computer.

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



The 'Add Note' dialog box is shown with the 'Attachments' tab selected. It features a '+ Select a file' button and a large area with 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' checkbox. The table is currently empty, showing 'No records found'.

5. Click **Save**.

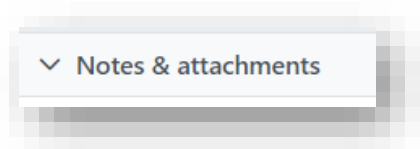


A close-up of the 'Cancel' and 'Save' buttons from the dialog box. The 'Save' button is highlighted in green.

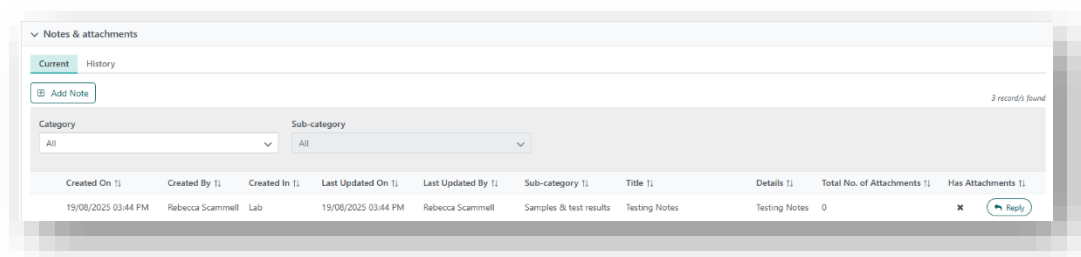
## EDITING OR DELETING A NOTE OR ATTACHMENT

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

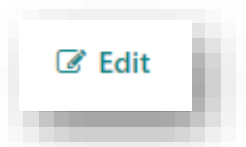
1. On the person's profile in OM, select the **Notes & attachments** tab.



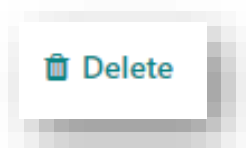
2. Click on the note to be edited or deleted.



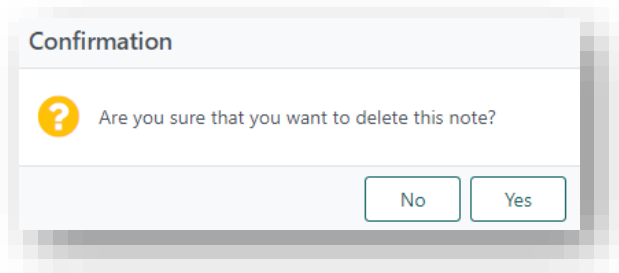
3. Click **Edit**. Update the note as required and click **Save**.



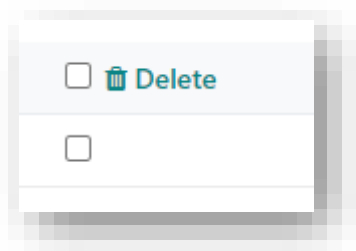
4. If the note requires deleting, click **Edit** and the button then changes to **Delete**.



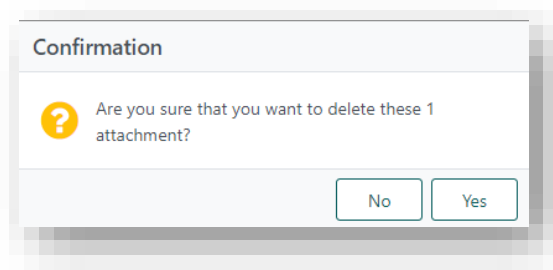
5. Click **Yes**.



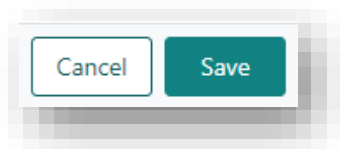
6. To delete an attachment select the check box next to the attachment and click **Delete**.



7. Click **Yes**.

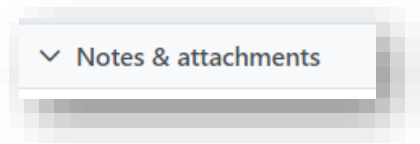


8. Click **Save**.

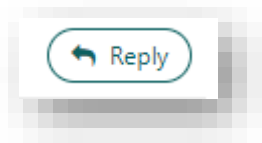


## REPLYING TO A NOTE

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 are 'Category' (set to 'Person') and 'Sub-Category' (set to 'Samples & test results'). There is a 'Details' section with a rich text editor containing the word 'Replying'. The editor has icons for bold, italic, underline, and list. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

## CHANGE HISTORY

Version number	Effective date	Summary of change
-		For previous change histories contact the National OrganMatch Office.
3	27/05/2025	Sprint 57 updates: <ul style="list-style-type: none"><li>Section 1 updated for Person- ANZKX notes.</li></ul>
4	22/07/2025	Sprint 58 updates: <ul style="list-style-type: none"><li>Section 1 updated to remove functionality for Person- ANZKX notes to be viewed in lab portal.</li></ul>
5	Refer to footer	Sprint 59 updates: <ul style="list-style-type: none"><li>Updated screenshots with new columns in notes and attachments for created on and created by with time stamps.</li></ul>

## ELECTRONIC SIGNATURE

Author	REBECCA SCAMMELL
Approver(s)	NARELLE WATSON