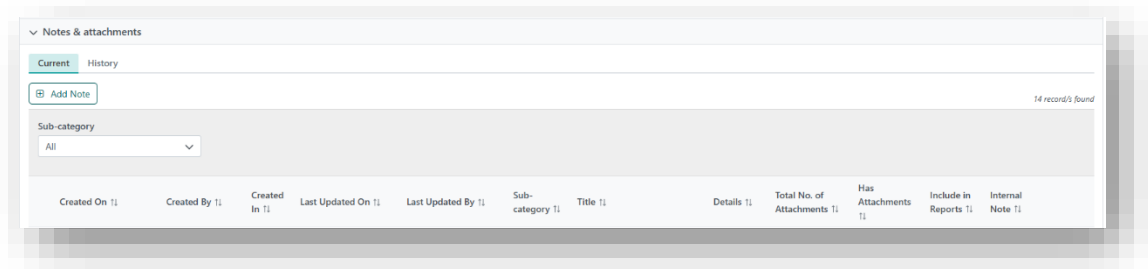


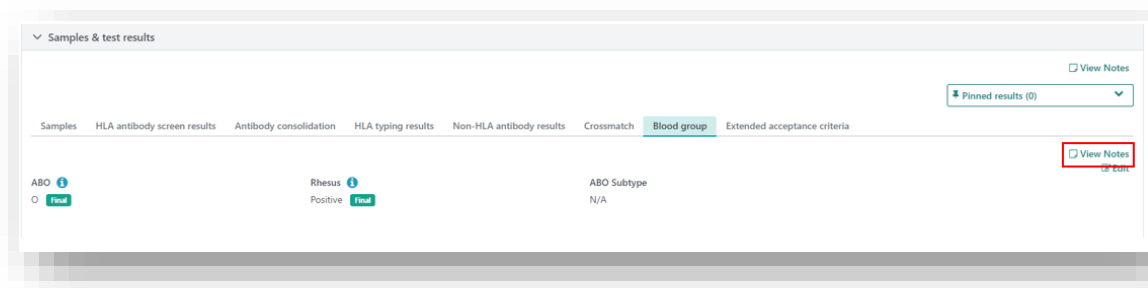
A note can be added to a person record in OrganMatch in the **Notes & attachments** section. Notes allow users to attach relevant information for the person or to include information on a report. When a note is added through the Transplantation or Donation Portals, the system generates a notification 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.

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



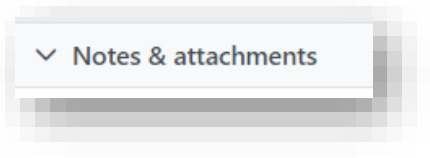
Notes can also be viewed in specific sections depending on their categorisation. For example, when attaching an ABO report to a note, the **Sub-category** ABO forms is selected. This note can then be viewed in Samples & tests results by clicking View Notes in the Blood group tab.



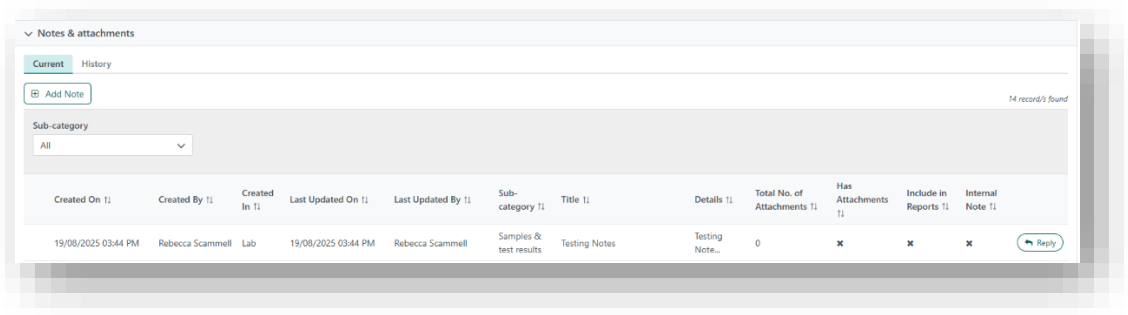
1. VIEWING NOTES AND ATTACHMENTS

1.1 VIEWING A NOTE IN THE PERSON PROFILE

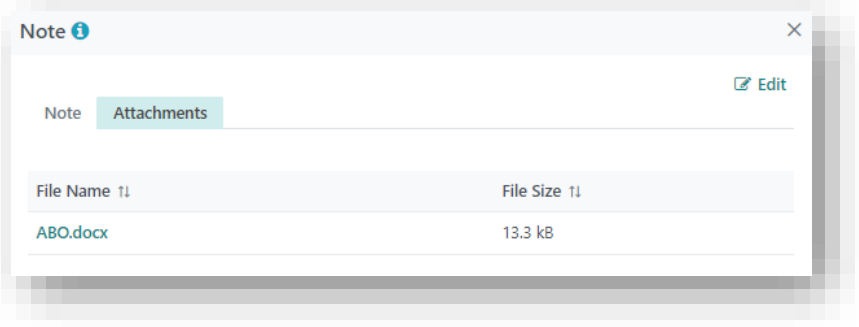
1. On the person’s profile in OM, select the **Notes & attachments** tab.



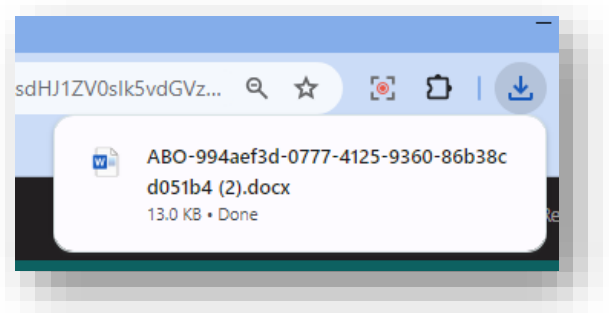
2. Click on the note to be viewed.



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



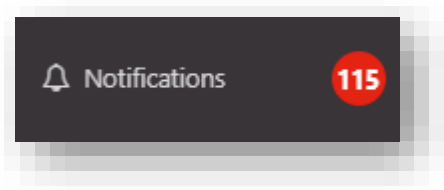
4. Access the file from downloads in the menu bar.



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.

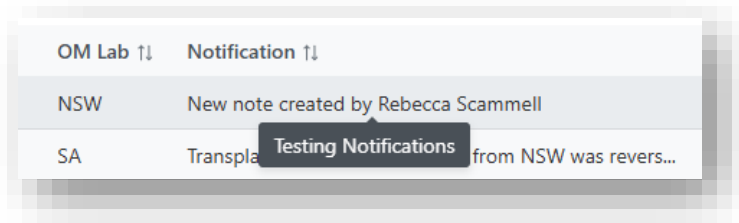
1. Select the **Notifications** menu.



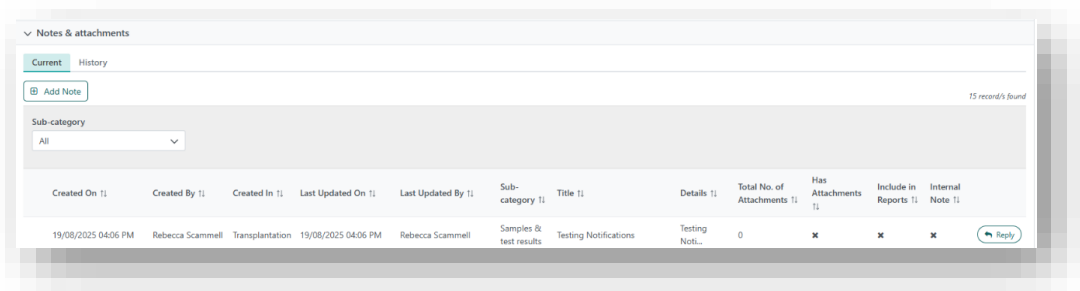
2. Find the notification for a New note created.

Current		History							
Last Name	First Name	TWL Status	Last Updated On	Last Updated By	Created In	User Role	OM Lab	Notification	Comment
aVQiTn	AqlaNI	Active	19/08/2025 16:06	Rebecca Scammell	Transplantation	LAB USER	NSW	New note created by Rebecca Scammell	-

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



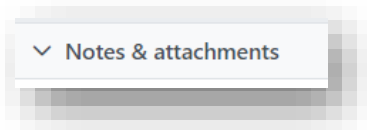
4. Clicking on the notification navigates to the Person Profile with the **Notes & attachments** tab expanded to view the note.



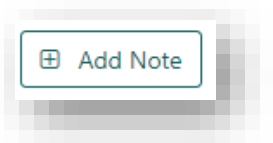
2. ADDING A NOTE AND ATTACHMENT

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**.

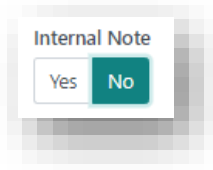


- Fill in the required fields of **Title** and **Details** and select the **Sub-Catgeory** from the dropdown.
The **Category** defaults to **Person**.
The **Category Person-ANZKX** applies to notes that can only be viewed by the ANZKX team.

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

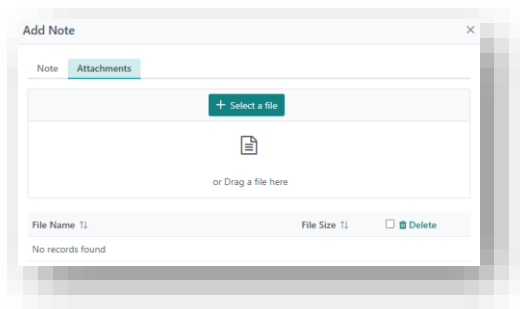
- Select **Yes** for **Include in Notes section of Reports** to include the note on a report. Select the type of report from the **Report** dropdown.

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.

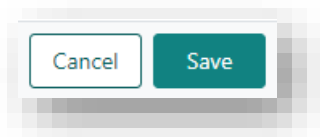


6. To upload an attachment, click the **Attachments** tab.
Drag and drop the file or click **Select a file** to upload the document from the computer.

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

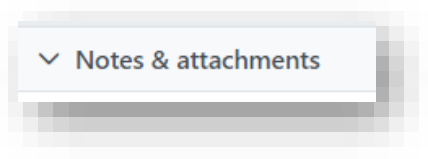


7. Click **Save**.

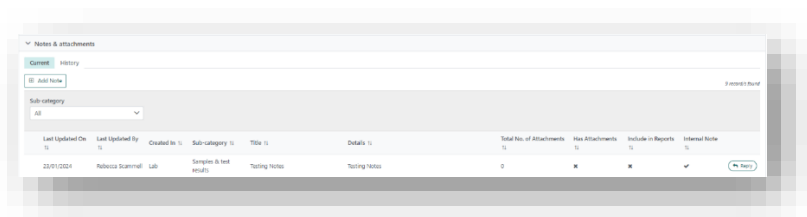


3. EDITING OR DELETING A NOTE OR ATTACHMENT

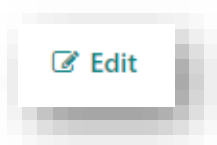
1. On the person's profile in OM, select the **Notes & attachments** tab.



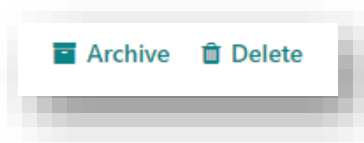
- Click on the note to be edited or deleted.



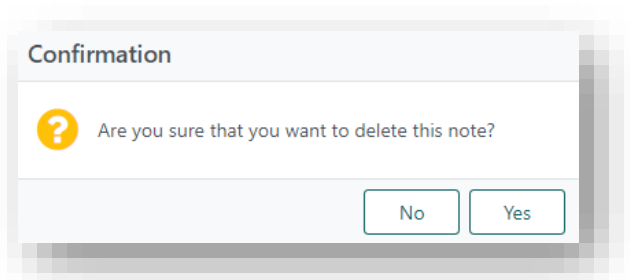
- Click **Edit**. Update the note as required and click **Save**.



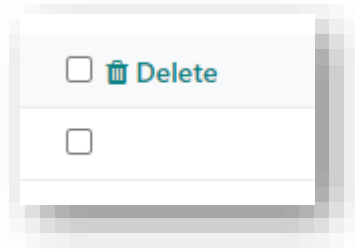
- If the note requires deleting, click **Edit** and the button then changes to **Archive** or **Delete**. Click **Delete**.



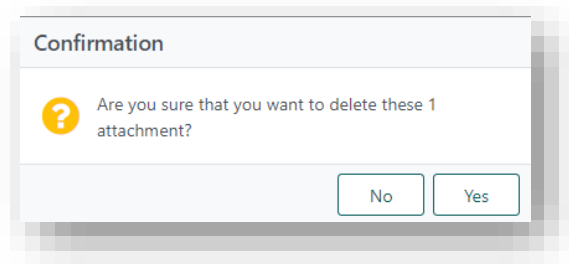
- Click **Yes**.



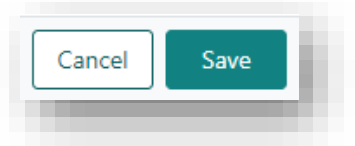
6. To delete an attachment select the check box next to the attachment and click **Delete**.



7. Click **Yes**.

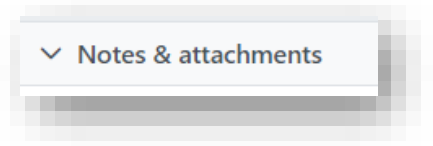


8. Click **Save**.

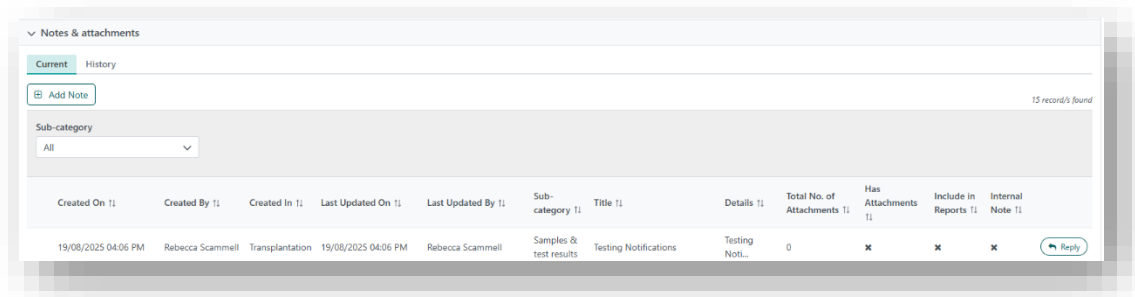


4. ARCHIVING AND UNARCHIVING A NOTE

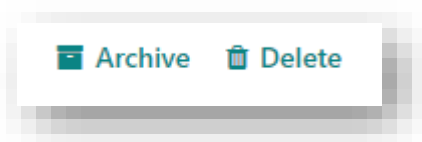
1. On the person's profile in OM, select the **Notes & attachments** tab.



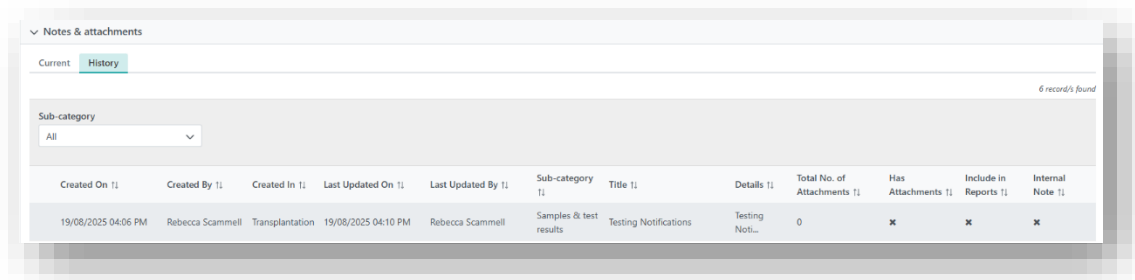
- Click on the note to be archived.



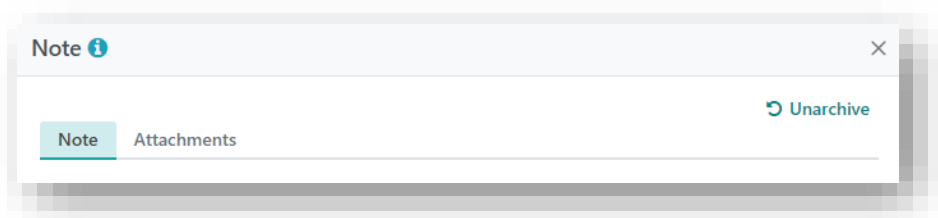
- Click **Edit** and the button then changes to **Archive** or **Delete**. Click **Archive**.



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



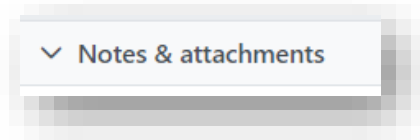
- To unarchive the note, click on the note in the **History** tab and click **Unarchive**. The note will be returned to the current tab.



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

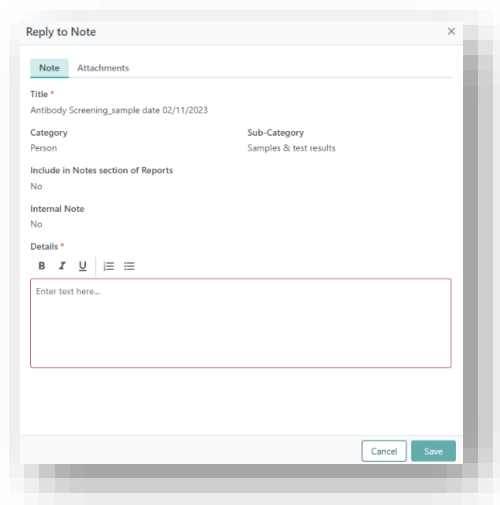
1. On the person's profile in OM, select the **Notes & attachments** tab.



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. Inside, there are two tabs: 'Note' (selected) and 'Attachments'. The 'Note' tab contains the following fields: '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), and 'Details' (a text area with a red border and a placeholder 'Enter text here...'). At the bottom right are 'Cancel' and 'Save' buttons.

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

15 record/s found

Sub-category

All

Created On	Created By	Created In	Last Updated On	Last Updated By	Sub-category	Title	Details	Total No. of Attachments	Has Attachments	Include in Reports	Internal Note	
19/08/2025 04:06 PM	Rebecca Scammell	Transplantation	19/08/2025 04:12 PM	Rebecca Scammell	Samples & test results	Testing Notifications	Testing Noti...	0	✖	✖	✖	 Reply
19/08/2025	Rebecca Scammell	Lab	Samples & test results	Testing Notifications	Replying		✖	✖	✖			

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">Section 2 updated for Person- ANZKX notes. Other: <ul style="list-style-type: none">Annual review.Addition of attachment file format to section 2.
3	22/07/2025	Sprint 58 updates: <ul style="list-style-type: none">Section 2 updated to remove functionality of viewing a Person-ANZKX note in the lab portal.
4	Refer to footer	Sprint 59 updates: <ul style="list-style-type: none">Updated screenshots with new columns in notes and attachments for created on and created by with time stamps.

ELECTRONIC SIGNATURE

Author	REBECCA SCAMMELL
Approver(s)	NARELLE WATSON