



# DocHub Release 1.1 User Guide

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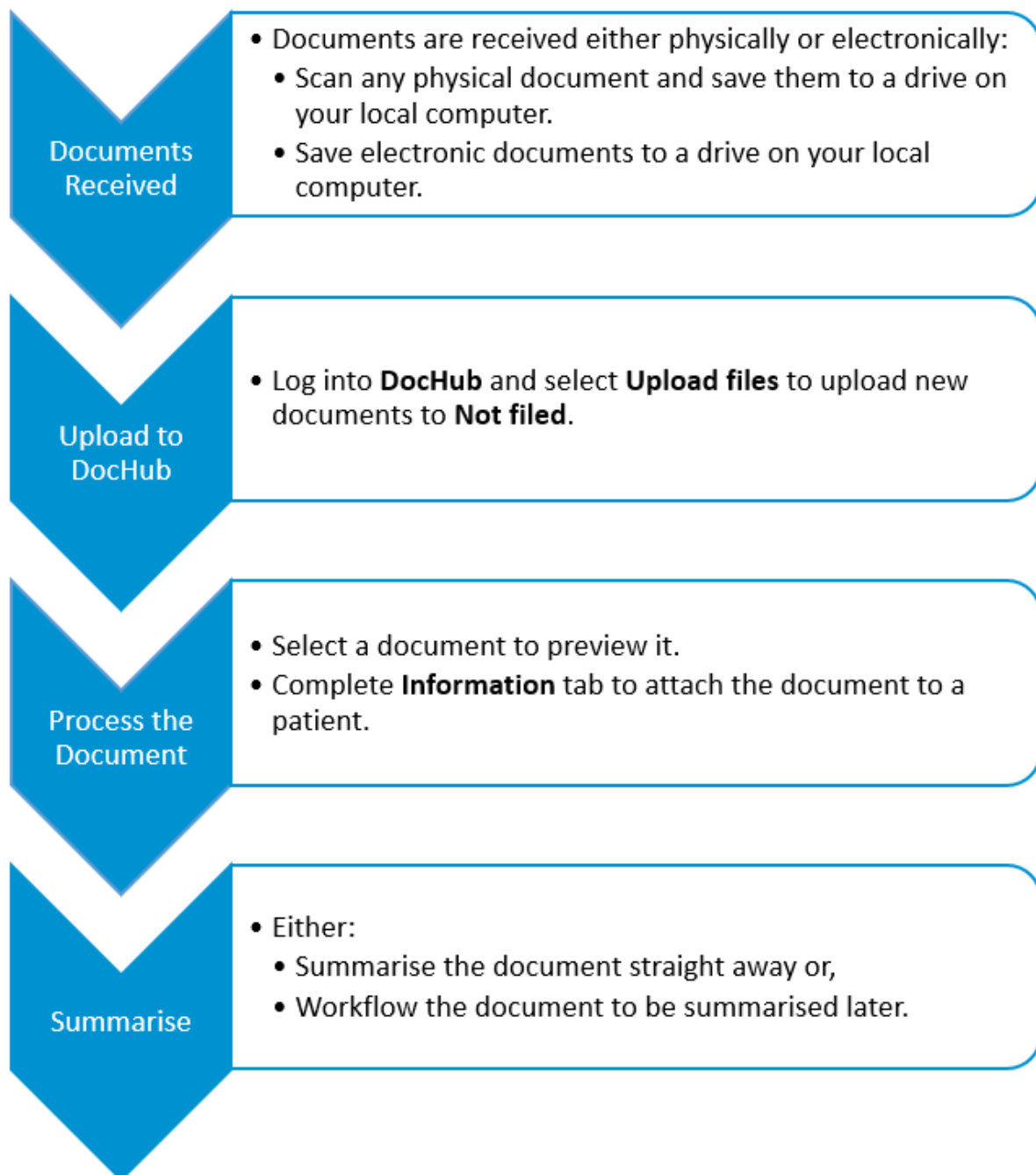
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## Introduction to DocHub

**DocHub** is the document management solution designed by **Cegedim Healthcare Solutions** to support you in receiving, processing, filing and managing the workflow of documents, both physical and electronic, received by your practice.

The following overview shows the summary of a document moving through the **DocHub** process:



Supported media files include:

- .JPG and .JPEG
- .PDF
- .DOC and .DOCX
- .TIF and .TIFF
- .PNG
- .TXT
- .RTF
- .ODT
- .ODS
- .ODP



## Logging in to DocHub

To log in to **DocHub**:

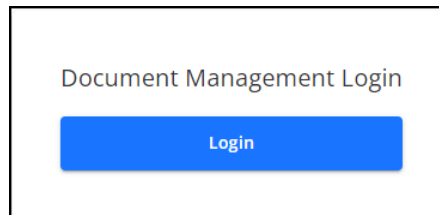
1. From your Internet browser, enter [http](http://) and press **Enter** on your keyboard.

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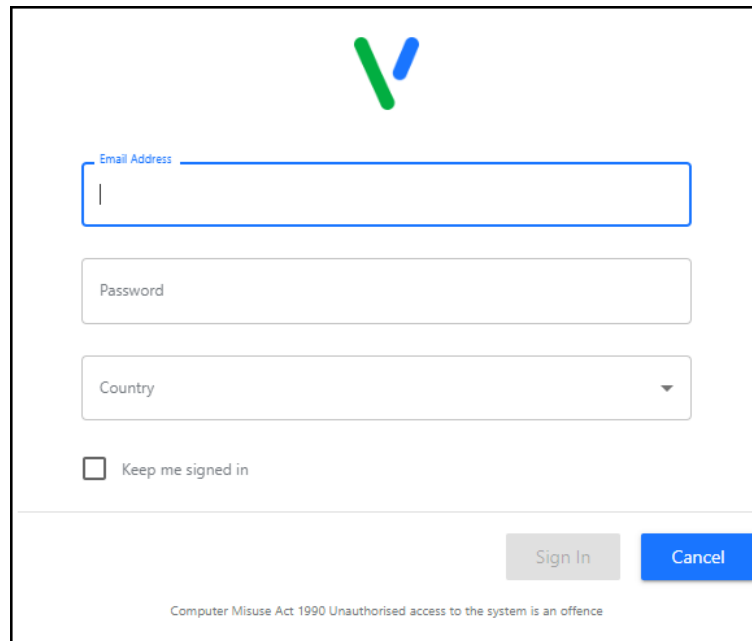
 **Important - DocHub** is not compatible with **Internet Explorer**. Please use **Google Chrome** or **Microsoft Edge**.

---

2. Select **Login**:




3. The **Log in** screen displays:



Complete as appropriate:


- **Email Address** - Enter your registered email address.
- **Password** - Enter your password.

---

 **Note** - If you are a **Vision 3** user, your registered email address is the one entered in **Vision 3 - Control Panel - File Maintenance - Staff - Addresses - Communication Numbers**.

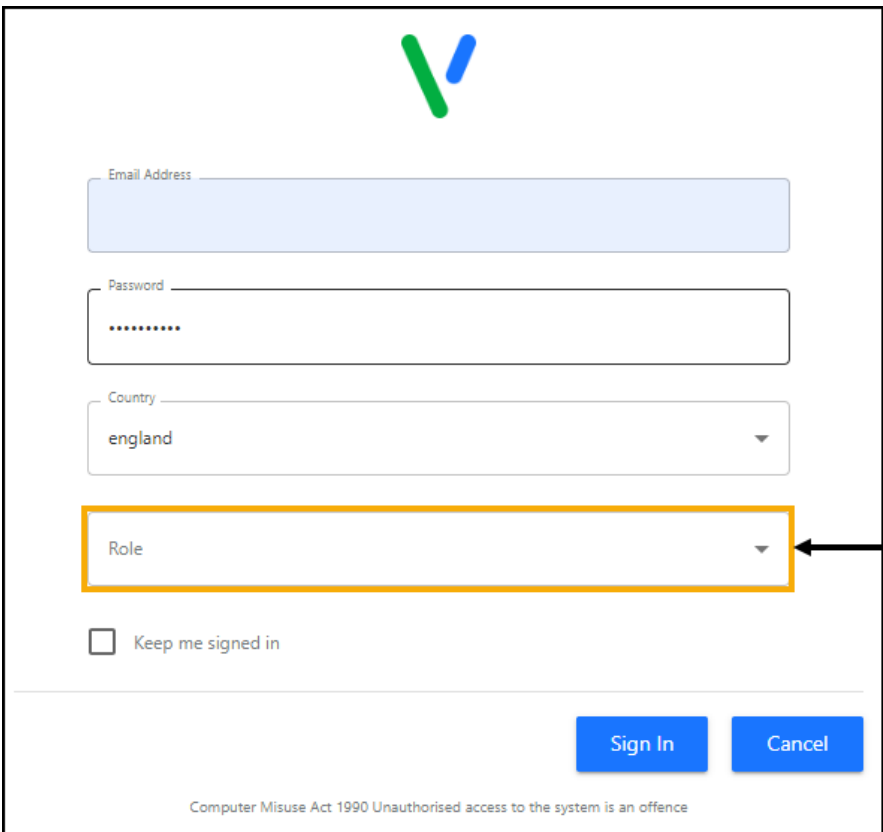
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 **Note** - If you are using **DocHub** in a shared care setting, your username and password is set up by your system administrator.

---

4. Select **Sign in** .
5. If you have multiple roles set up in **DocHub**, for example, if you work for more than one practice, or a practice and a federation, you must now select the appropriate role for this session:



Enter your role

6. Finally, select **Sign In**  again to display the **DocHub Home** screen.

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 **Note** - On start up **DocHub** displays the **Not filed** folder by default.

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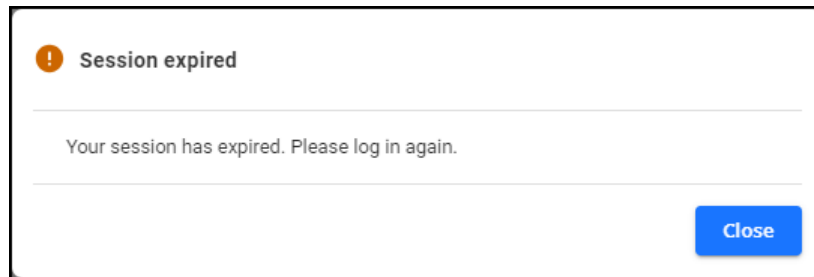
 See **Navigating DocHub** on page **10** for details.

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## Session Expired

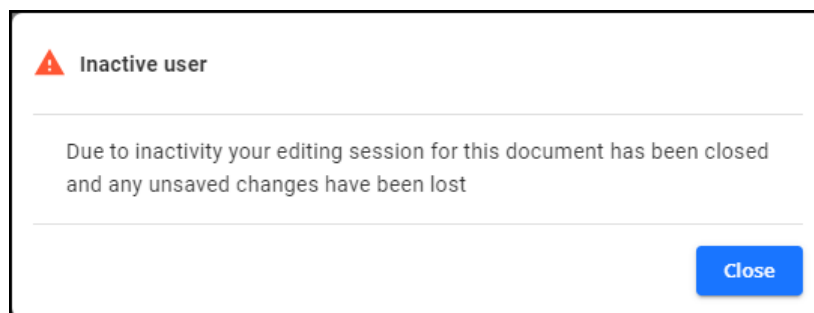
If you are logged in to **DocHub** for over eight hours, you are automatically logged out. You are presented with a warning 'Your session has expired. Please log in again.':



To log back in simply select **Close**  and log in as normal.

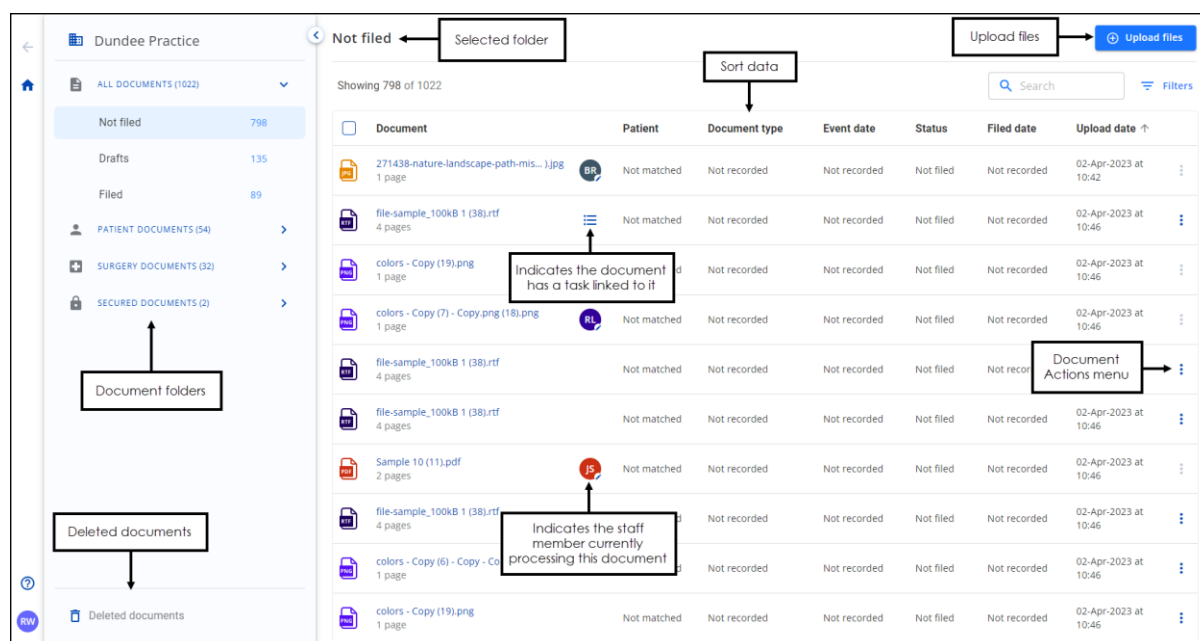
## Inactive User

If you are inactive for 30 minutes while editing a document in **DocHub** the **Edit** screen closes and unsaved changes are lost. You are presented with a warning 'Due to inactivity your editing session for this document has been closed and any unsaved changes have been lost':



Select **Close**  to continue to use **DocHub**.

## Navigating DocHub



Not filed ← Selected folder

Sort data

Upload files → Upload files

Document folders

Deleted documents

Indicates the document has a task linked to it

Indicates the staff member currently processing this document

Document Actions menu

Document	Patient	Document type	Event date	Status	Filed date	Upload date
271438-nature-landscape-path-mis... .jpg 1 page	BR	Not matched	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:42
file-sample_100kB 1 (38).rtf 4 pages		Not recorded	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:46
colors - Copy (19).png 1 page		Not recorded	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:46
colors - Copy (7) - Copy.png (18).png 1 page	RL	Not matched	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:46
file-sample_100kB 1 (38).rtf 4 pages		Not recorded	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:46
file-sample_100kB 1 (38).rtf 4 pages		Not recorded	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:46
Sample 10 (11).pdf 2 pages		Not matched	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:46
file-sample_100kB 1 (38).rtf 4 pages		Not recorded	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:46
colors - Copy (6) - Copy - Co 1 page		Not recorded	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:46
colors - Copy (19).png 1 page		Not matched	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:46

See [Uploading Documents](#) on page 13, [Processing Documents](#) on page 17, [Viewing Filed Documents](#) on page 44 and [Document Actions Menu](#) on page 51 for details.



## Refreshing Document Lists

You are notified of new documents in the in the following way when they are added to the **Filed**, **PATIENT DOCUMENTS**, **SURGERY DOCUMENTS** and **SECURED DOCUMENTS** folders:

Patient documents Upload files

Showing 54 of 1022 1 document added in Patient documents New document notification Search Filters

<input type="checkbox"/>	Document	Patient	Document type	Event date	Status	Filed date ↓	Upload date
	file-sample_100kB 1 (32).rtf 4 pages	ABALUNAM, A (Miss) NHS 411 123 1284	Administrative letter	03-Jul-2023	Filed	15-Sep-2023 at 07:01	02-Apr-2023 at 10:40
	Sample 12 (11).pdf 2 pages	FAAL, Patricia (Ms) NHS 411 120 5445	Clinical letter	Not recorded	Filed	14-Sep-2023 at 12:26	02-Apr-2023 at 10:46
	test (2).pdf 3 pages	COOPER SMITH, Rita (Mrs) NHS 411 113 5625	Clinical letter	Not recorded	Filed	14-Sep-2023 at 12:22	14-Sep-2023 at 12:21
	Sample 6 (11).pdf 2 pages	COOPER SMITH, Rita (Mrs) NHS 411 113 5625	Clinical letter	Not recorded	Filed	14-Sep-2023 at 10:52	02-Apr-2023 at 10:46
	file-sample_100kB 1 (38).rtf 4 pages	SADDLER, Dawn (Miss) NHS 411 122 4652	Anaesthesia record	Not recorded	Filed	13-Sep-2023 at 11:13	02-Apr-2023 at 10:46
	Sample 7 - Copy (16).pdf 2 pages	BACKHOUSE, Vincent (Mr) NHS 411 113 9132	Clinical letter	Not recorded	Filed	13-Sep-2023 at 10:33	02-Apr-2023 at 10:44
	file-sample_100kB 1 (38).rtf 4 pages	SADDLER, Dawn (Miss) NHS 411 122 4652	Anaesthesia record	Not recorded	Filed	13-Sep-2023 at 10:18	02-Apr-2023 at 10:46
	Sample 5 (11).pdf 1 page	ABALUNAM, A (Miss) NHS 411 123 1284	Anaesthesia record	Not recorded	Filed	13-Sep-2023 at 09:58	02-Apr-2023 at 10:46
	colors (11).png 1 page				Filed	13-Sep-2023 at 09:31	02-Apr-2023 at 10:46

New document notification ↓ A new document has been added to Patient documents Refresh X

- **n document added in Patient documents**

1 document added in Patient documents Refresh

Where  $n$  is the number of new documents added. Select **Refresh** Refresh to refresh the document list.

- **A new document has been added to Patient documents**

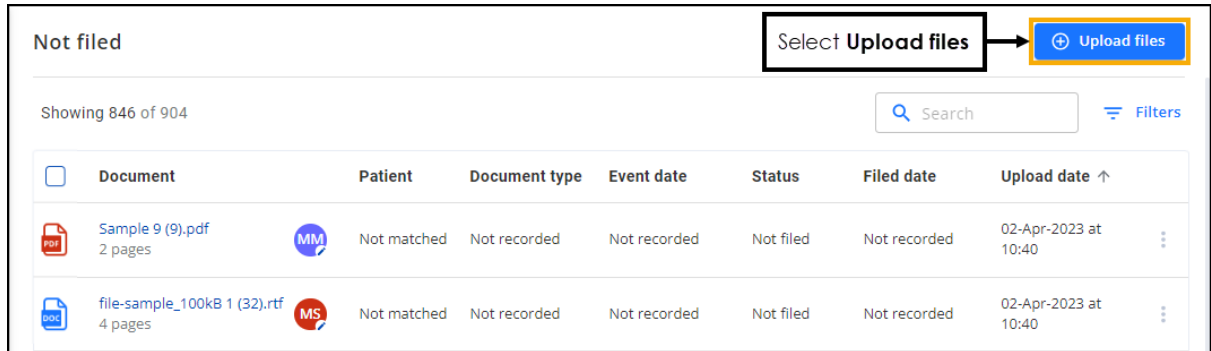
A new document has been added to Patient documents Refresh X - Select **Refresh**

Refresh to refresh the document list.

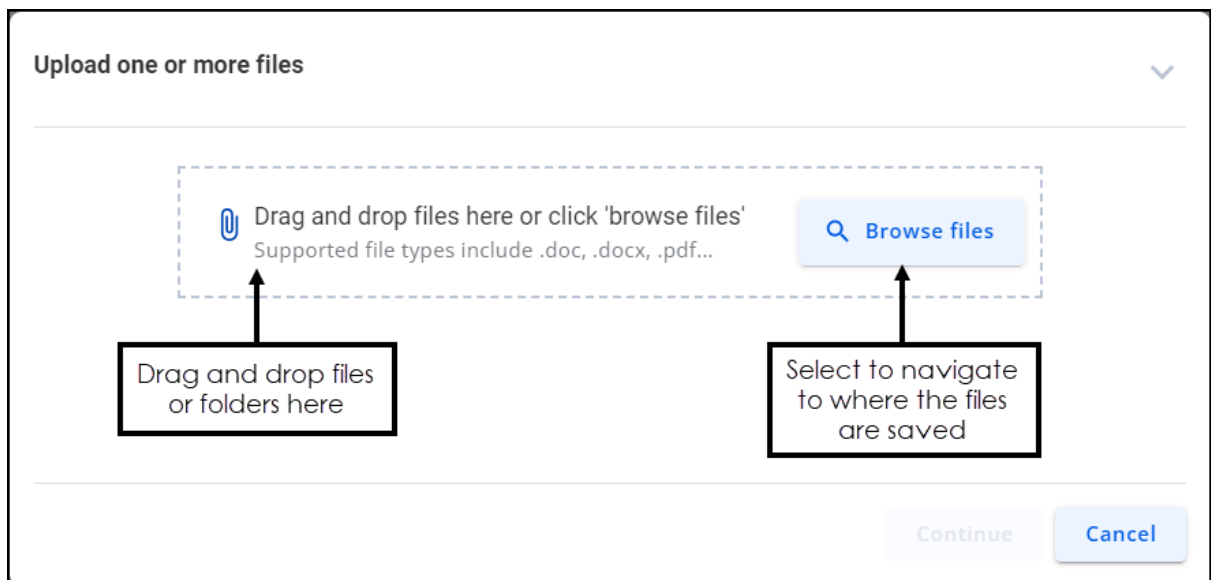
## Uploading Documents

It is quick and easy to upload a document from your local computer into **DocHub**:



1. From **DocHub**, select **Upload files** :

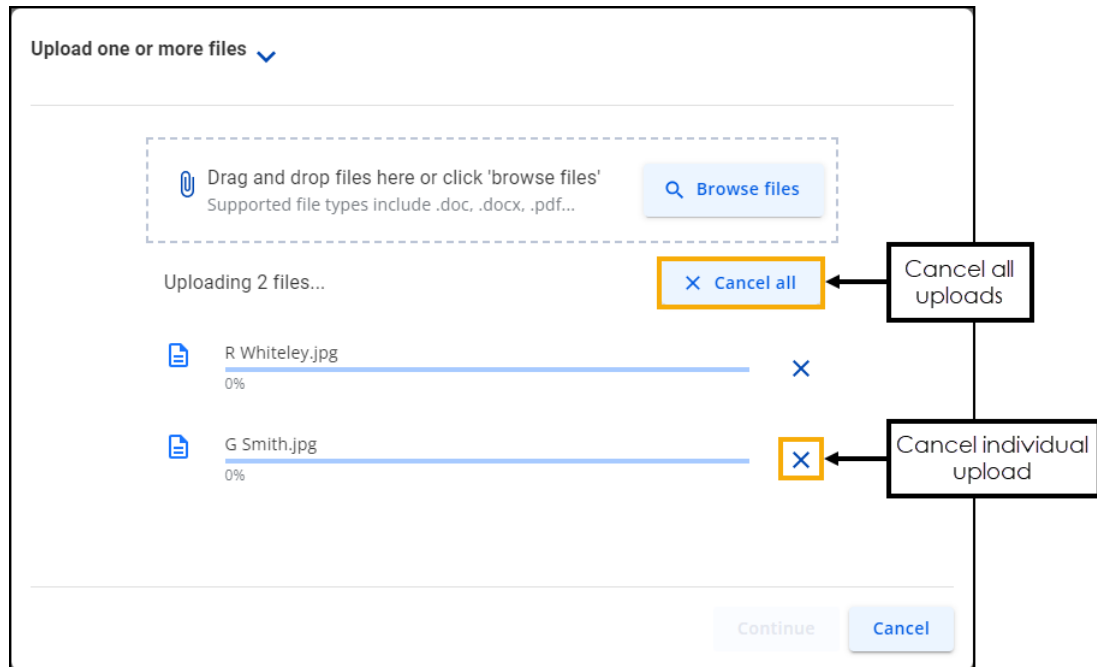




2. The **Upload one or more files** screen displays, either:

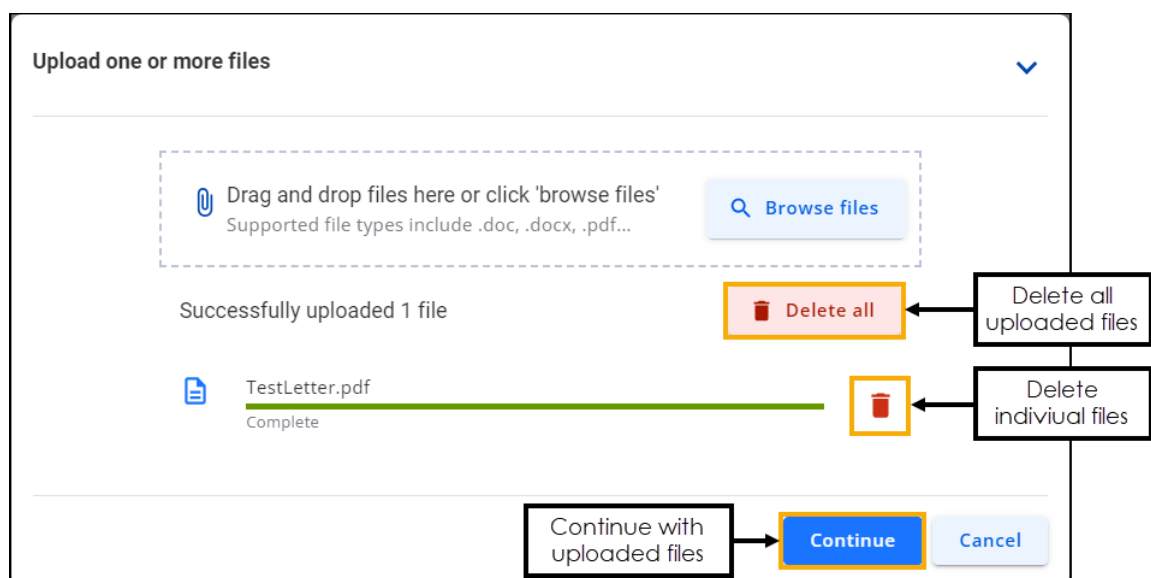


- Select **Browse files**, navigate to where you saved the documents, select an entire folder, or individual files and select **Open**, or,
- Open your **File Explorer** and drag and drop the file(s) or folder required on to the **Drag and drop files here** section.

3. The documents start uploading. You have the opportunity to cancel the upload, select **Cancel**  against individual files or **Cancel all**  if you have uploaded files in error:



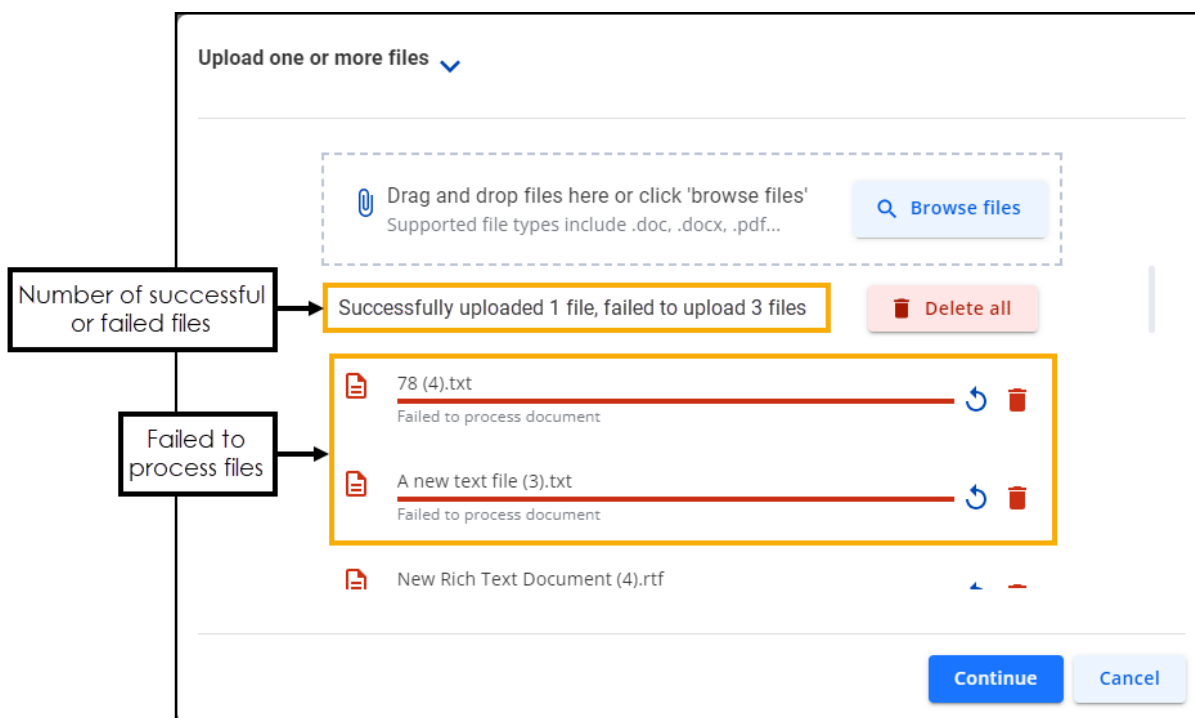
4. Once uploaded, you have the opportunity to delete any documents not required, select **Delete**  against individual files or **Delete all**  if you have uploaded files in error. Once you are happy with the documents uploaded, select **Continue**:



5. The uploaded documents automatically display in your **All Documents - Not filed** folder and are now ready for processing by any member of staff.

## Failed Uploads

If **DocHub** failed to process a document for upload, the number of failed uploads display and the individual files are highlighted in red:




Select **Continue** to upload the successful files to **DocHub**.

## Optical Character Recognition

**DocHub** uses Optical Character Recognition (OCR) to convert scanned documents into searchable PDF files. When the OCR process is running the

**OCR in progress**  notification displays.


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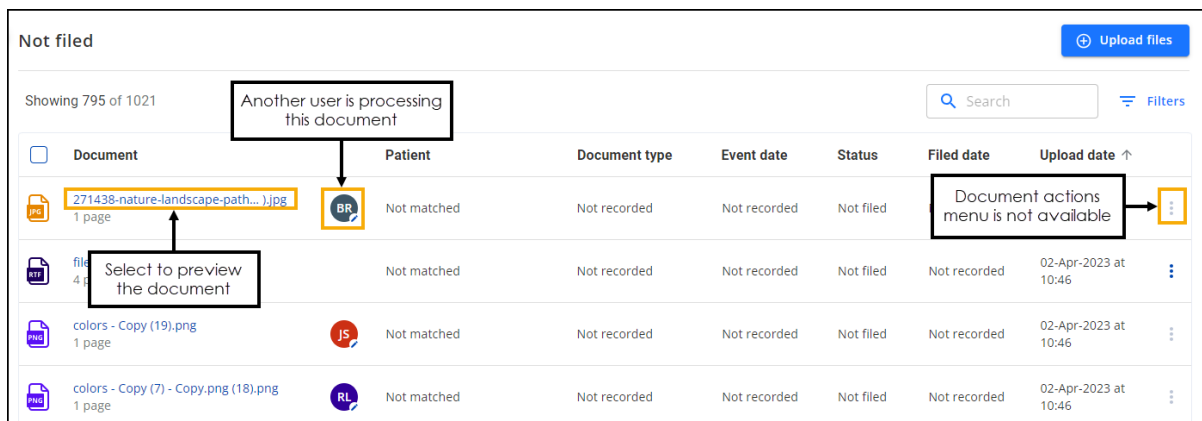
 See [Processing Documents](#) on page 17 and [Using Filters in DocHub](#) on page 57 for details.

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## Concurrent Users


**DocHub** displays the initials of the person who is processing the document,

**Document actions**  is unavailable however you can select the document name to display a preview:

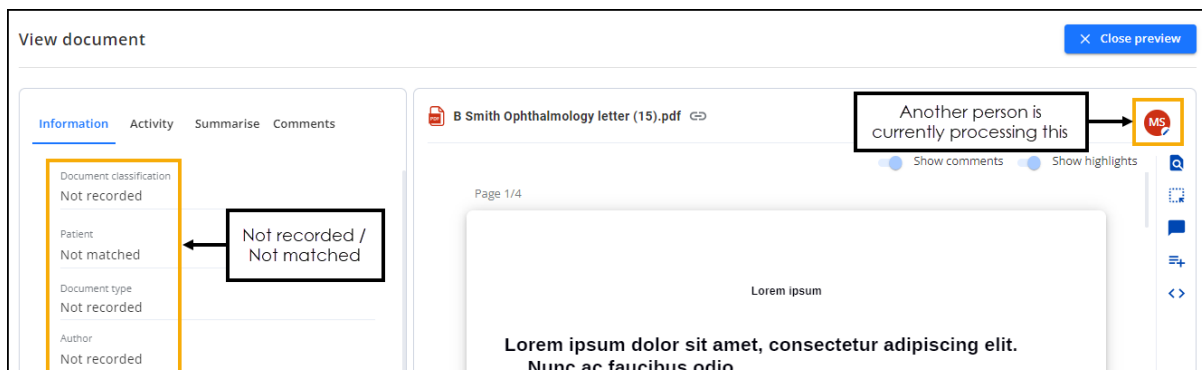


The screenshot shows a document list with the following data:

Document	Patient	Document type	Event date	Status	Filed date	Upload date
 271438-nature-landscape-path...).jpg 1 page	 Not matched	Not recorded	Not recorded	Not filed		
 file 4 p	Not matched	Not recorded	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:46
 colors - Copy (19).png 1 page	 Not matched	Not recorded	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:46
 colors - Copy (7) - Copy.png (18).png 1 page	 Not matched	Not recorded	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:46

 **Note** - The **Document actions** menu is available, however the **Edit document data** and **Delete** options are not available.

From the **View document** screen, if someone is processing a document, their initials display at the top right of the screen. The **Information** tab displays also displays **Not recorded** or **Not matched**:

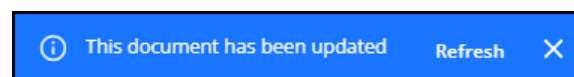



The screenshot shows the 'View document' screen for 'B Smith Ophthalmology letter (15).pdf'. The 'Information' tab is active, showing the following details:

- Document classification: Not recorded
- Patient: Not matched
- Document type: Not recorded
- Author: Not recorded

At the top right, it indicates 'Another person is currently processing this' with initials 'MS'.

If the person processing the document you are viewing saves their changes a 'This document has been updated' banner displays:




 **Note** - This banner also displays if you are viewing a document when clinical codes and annotations are added or updated by other users.

Select **Refresh**  to refresh the document to the most up to date version.





## Documents with Linked Tasks


DocHub displays **View Tasks**  when the document has a task allocated to it:



Not filed Upload files

Showing 357 of 391 Search Filters


Document	Patient	Document type	Event date	Status	Filed date	Upload date ↑
<input type="checkbox"/> dummy - Copy (5).pdf 1 page	 Not matched	Not recorded	Not recorded	Not filed	Not recorded	22-Nov-2023 at 07:50
<input type="checkbox"/> testing text file.txt 1 page	 Not matched	Not recorded	Not recorded	Not filed	Not recorded	27-Nov-2023 at 12:24

*Note: A callout box points to the 'View Tasks' icon in the first row, stating: 'View Tasks displays when the document has a task allocated to it'.*

Select **View Tasks**  to view the allocated tasks:

Document	Patient	Document type	Event date
<input type="checkbox"/> dummy - Copy (5).pdf 1 page			Not recorded
<input type="checkbox"/> testing text file.txt 1 page			Not recorded
<input type="checkbox"/> image_pdf (3) - Copy.pdf (6).pdf 1 page	Not matched	Not recorded	Not recorded

Showing 1 of 1 Tasks

 Task 45

Please workflow

*Note: A callout box points to the 'View Tasks' icon in the first row, stating: 'Select View Tasks to view allocated tasks'. Another callout box points to 'Task 45' in the task list, stating: 'Select to open the task in Tasks'.*

Select the task name to open in **Tasks**.

## Processing Documents

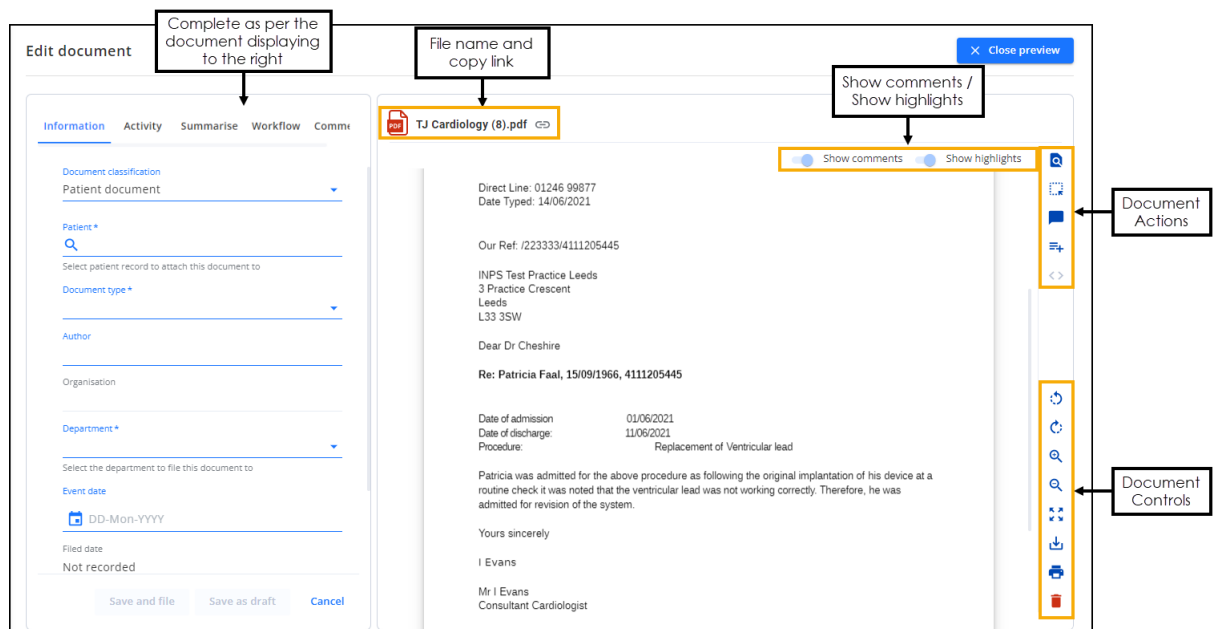
Regardless of how a document is received, you process them in the same way:

1. From **DocHub**, if necessary, select **Not filed** from the **Side Navigation Bar**.



**Training Tip - Not filed** initially displays by default when you open **DocHub**, with the earliest uploaded document displaying first. You can sort the documents into any order by selecting a column header to order them by.

2. Select the document name to display a preview and start processing the data:




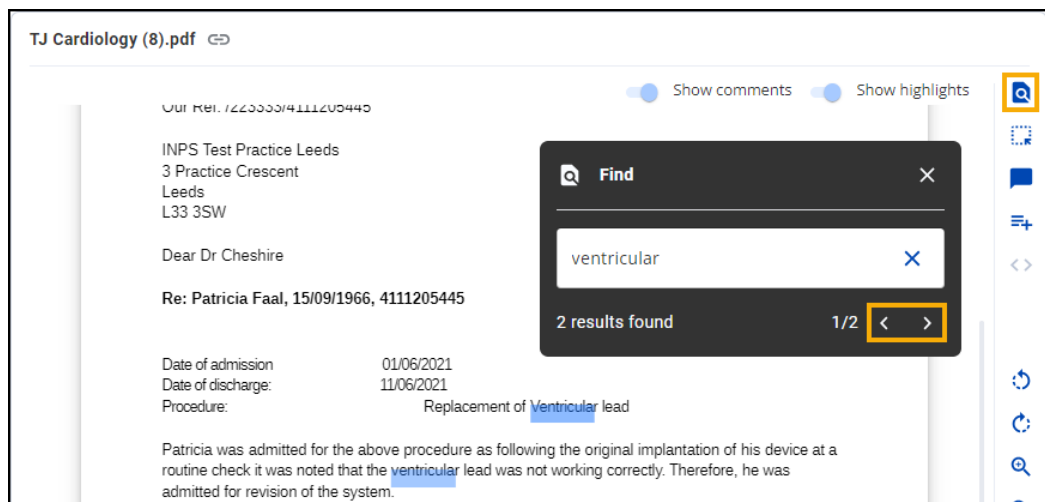
The screenshot shows the 'Edit document' interface for a PDF document titled 'TJ Cardiology (8).pdf'. The interface is divided into several sections:

- Left Panel (Form):** Contains fields for document classification (Patient document), patient search, document type, author, organisation, department, event date (DD-Mon-YYYY), and filed date (Not recorded). Buttons for 'Save and file', 'Save as draft', and 'Cancel' are at the bottom.
- Top Bar:** Includes 'Edit document', 'Complete as per the document displaying to the right', 'File name and copy link', and 'Close preview'.
- Document Content:** Displays the PDF text, including patient details (Direct Line: 01246 99877, Date Typed: 14/06/2021), referral information (Our Ref: /22333/4111205445), and clinical notes (INPS Test Practice Leeds, 3 Practice Crescent, Leeds, L33 3SW; Dear Dr Cheshire; Re: Patricia Faal, 15/09/1966, 4111205445; Date of admission: 01/06/2021; Date of discharge: 11/06/2021; Procedure: Replacement of Ventricular lead; Patricia was admitted for the above procedure as following the original implantation of his device at a routine check it was noted that the ventricular lead was not working correctly. Therefore, he was admitted for revision of the system; Yours sincerely; I Evans; Mr I Evans, Consultant Cardiologist).
- Right Panel (Actions and Controls):** Features a 'Document Actions' menu with icons for comments, highlights, and other functions, and a 'Document Controls' menu with icons for zooming, scrolling, and printing.

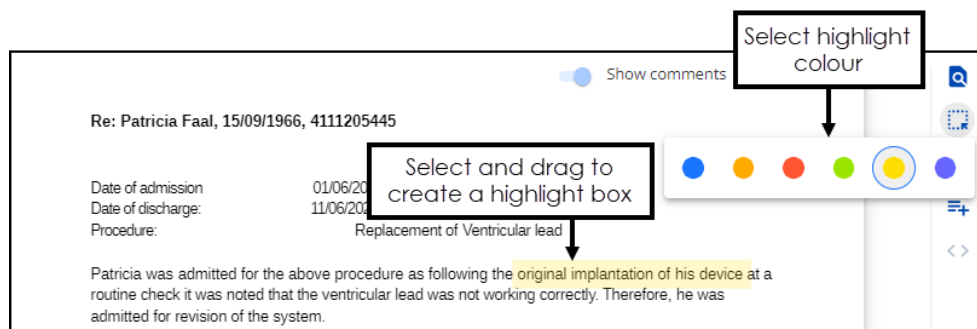
The following controls are available to help you process a document:

## Document Actions

- 
**Find** - Select to search for specific text in the document. The **Find** screen displays, enter your search criteria into **Search document**, the document highlights as you type. Use the arrows to scroll through the results:



- 
**Highlight** - Select to highlight a block of text in the document. Hover over **Highlight** to select a highlight colour and then select and drag to create the highlight:



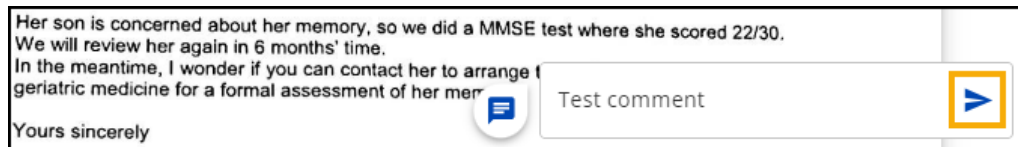
Hover over a highlight, to view who created the highlight and when it was created.



See [Adding a Highlight](#) on page 35 for details.

-  **Comment** - Select to add a comment to the document.



Enter the comment required and select **Send** :










The comment is added to the document.





See [Adding a Comment](#) on page 31 for details.

-  **Create Task** - Select to create a Task for this document. See [Creating a Task](#) on page 36 for details.
-  **Next page** - Select to move through the pages of a multi-page document.

## Document Controls

-  /  **Rotate left/Rotate right** - Especially useful for images, you can use this to rotate the document through 90 degrees at a time either clockwise or counter clockwise.
-  /  **Zoom in/Zoom out** - Select the **Minus -** to reduce the size of the document or **Plus +** to enlarge the document. The percentage value in the middle displays the changes you make.
-  **Full screen** - Select to display the document in a full screen format. See [Full Screen Mode](#) on page 38 for details.
-  **Download** - Select to download the selected document. To view your **Downloads** folder, open **Windows File Explorer**, and then locate and select **Downloads**. A list of your recently downloaded files displays.
-  **Print** - Select to print the document.

-  **Delete** - Select to delete the document. The **Delete document** screen displays, select the deletion reason, add any notes required and then select **Delete**:

 **Delete document**

---

This document will be moved to the "Deleted" folder and will be removed from the system after 14 days unless restored. Please select the reason for deletion:

Document uploaded in error  
 Duplicate document  
 Other (please provide details below)

Notes...


0/100

Delete
Cancel

The deleted documents are then stored in the **Deleted documents** folder for 14 days, after this time, unless they are restored, the documents are deleted from the system. To restore a document, see [Restoring a Deleted Document](#) on page 55.

### Show comments / Show highlights


Slide the toggle to switch the comments and highlights **On**  or **Off** .

If there are no comments or highlights on the document the option is disabled .

### Share document

Select **Copy link to document**  to copy the document link to your Windows Clipboard, this can be useful if, for example, you want to share with a colleague:



3. You can now complete the document data using the following tabs:
- **Information** - Enter document and patient information to allow you to file and locate the document. See [Filing a Document](#) on page [23](#) for details.
  - **Activity** - Select to view the document activity/audit trail, see [Viewing Document Activity](#) on page [26](#) for details.
  - **Summarise** - Select to allocate clinical terms relating to this document. The first time you select the **Summarise** tab it is in Edit mode, after that you must select **Edit** to add or update any clinical terms. See [Summarising a Document](#) on page [27](#) for details.
  - **Workflow** - Select to view the workflow items/Tasks linked to this document. See [Workflow Documents](#) on page [31](#) for details.
  - **Comments** - Select to view the active and resolved comments on the document. See [Viewing and Resolving Comments on a Document](#) on page [33](#) for details.
4. Select **Close Preview** or  to return to the **DocHub Home** screen.

## Filing a Document

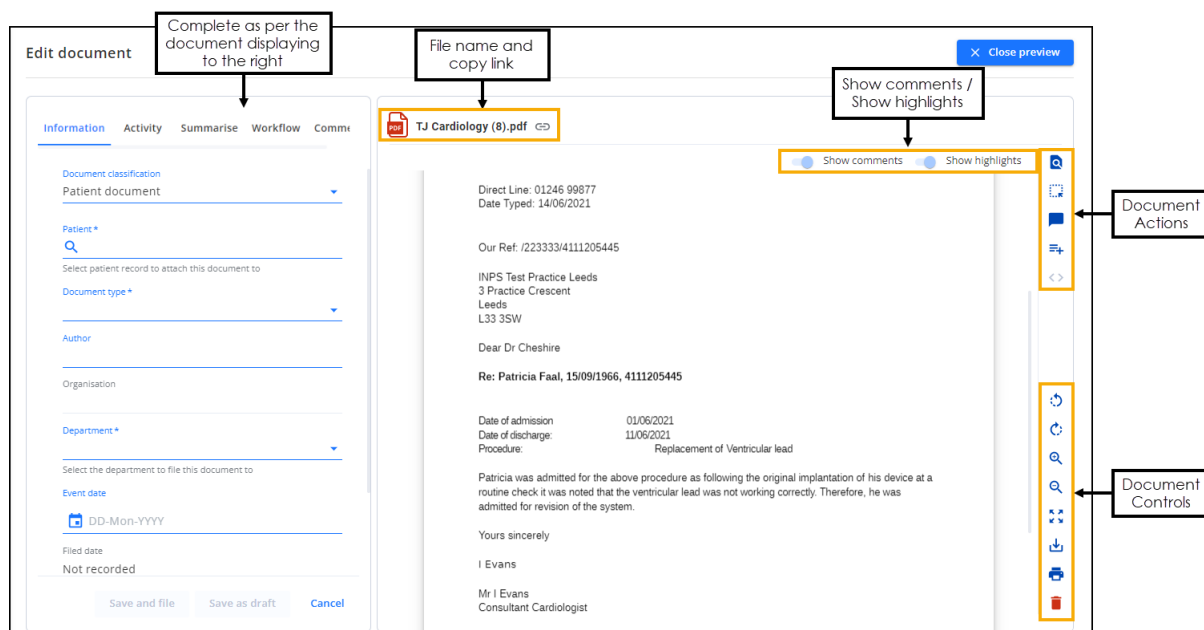
To file a document in **DocHub**:

1. From **DocHub**, if necessary, select **Not filed** from the **Side Navigation Bar**.



**Training Tip - Not filed** initially displays by default when you open **DocHub**, with the earliest uploaded document displaying first. You can sort the documents into any order by selecting a column header to order them by.

2. Select the document name to display a preview and start processing the data:



The screenshot shows the DocHub document preview interface. On the left is the 'Edit document' sidebar with fields for document classification, patient information, author, and department. The main area displays a document titled 'TJ Cardiology (8).pdf'. Annotations include:

- 'Complete as per the document displaying to the right' pointing to the document title.
- 'File name and copy link' pointing to the document title.
- 'Show comments / Show highlights' pointing to the document title.
- 'Document Actions' pointing to the right-hand sidebar containing icons for comments, highlights, and other actions.
- 'Document Controls' pointing to the bottom-right corner of the document preview area.

The document content includes:

Direct Line: 01246 99877  
Date Typed: 14/06/2021

Our Ref: /223333/4111205445

INPS Test Practice Leeds  
3 Princes Crescent  
Leeds  
L33 3SW

Dear Dr Cheshire

Re: Patricia Faal, 15/09/1966, 4111205445

Date of admission: 01/06/2021  
Date of discharge: 11/06/2021  
Procedure: Replacement of Ventricular lead

Patricia was admitted for the above procedure as following the original implantation of his device at a routine check it was noted that the ventricular lead was not working correctly. Therefore, he was admitted for revision of the system.

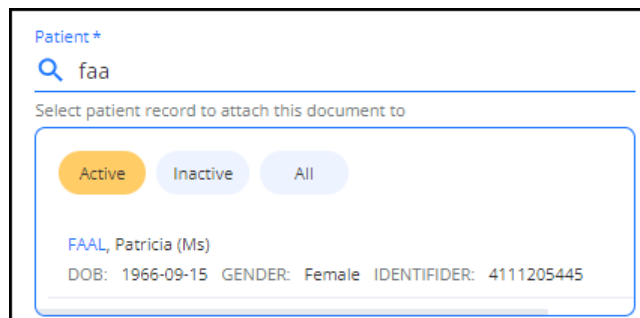
Yours sincerely  
I Evans  
Mr I Evans  
Consultant Cardiologist

3. From the **Information** tab, you can enter document information to allow you to file and help you to locate a document:



**Note** - Mandatory items are indicated by an asterisk \*.

- **Document classification** - Defaults to **Patient document**, select and update from the available list if required.
- **Patient** (Required) - Enter the first few letters of the surname and forename and the smart search returns matching patients, the more you enter the shorter the list is:



You can also search for patients by:

- Birth Year
- Postcode
- NHS/CHI Number

Filter the search, if required, by **Active**, **Inactive** or **All** patients by selecting appropriately. Select the patient required.

- **Document type** (Required) - Select from the available list as required. These are linked to SNOMED CT terms so ensure you select the most appropriate document type.
- **Author** - Enter the name of the person that sent the letter.
- **Organisation** - Enter the name of the organisation that sent the letter.
- **Department** (Required) - Select the appropriate department from the available list. This determines where the documents are stored under **PATIENT DOCUMENTS**.
- **Event date** - Using the calendar, select the date of the event the document refers to.



**Training Tip** - You can remove any individual selection using the **X** that displays when you hover over the end of each line.



Select either:

- **Save and file** - To save the details you have selected and file this to the patient's clinical record. The document is moved from **Not filed** to the relevant **PATIENT DOCUMENTS** folder (as set in **Department**).
- **Save as draft** - To save the details you have selected, but not file to the patient's clinical record yet. The document is moved from **Not filed** to the **Drafts** folder.
- **Cancel** - To remove all the details you have selected and leave the document in the **Not filed** folder.

4. Select **Close Preview** or  to return to the **DocHub Home** screen.

## Viewing Document Activity

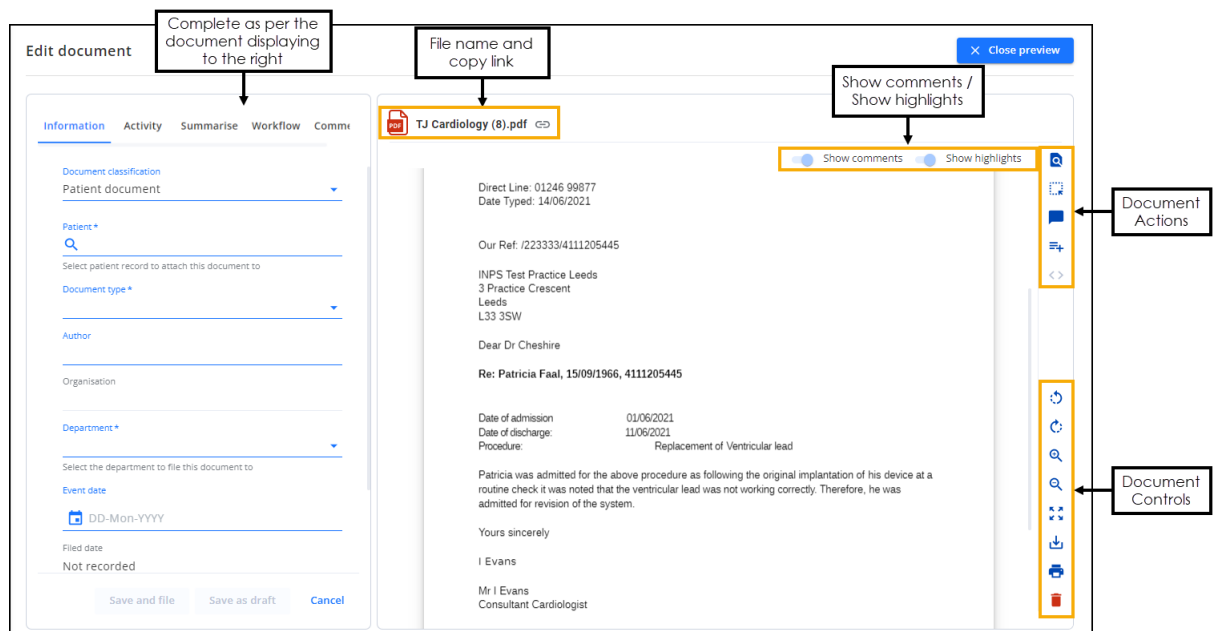
To view the document activity:

1. From **DocHub**, search for the required document.



**Training Tip** - You can sort the documents into any order by selecting a column header to order them by.

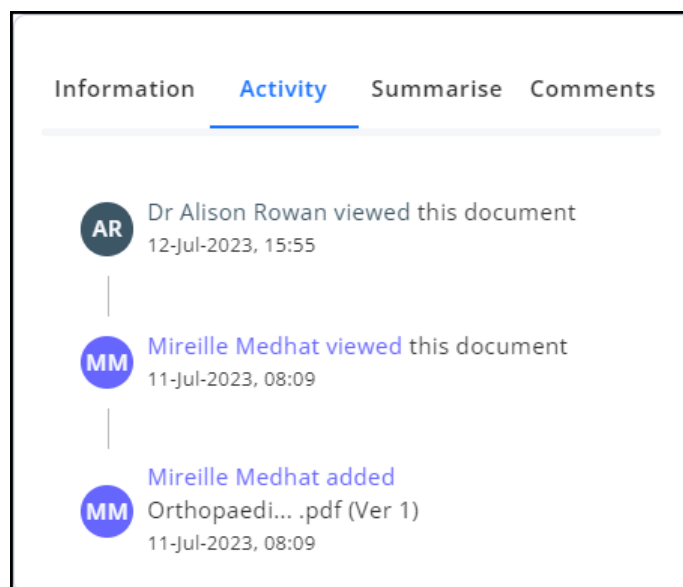
2. Select the document name to display a preview and start processing the data:



The screenshot shows the 'Edit document' interface for a PDF document titled 'TJ Cardiology (8).pdf'. The interface is divided into three main sections:

- Left Panel (Information):** Contains fields for document classification (Patient document), patient search, document type, author, organisation, department, event date (DD-Mon-YYYY), and filed date (Not recorded). Buttons for 'Save and file', 'Save as draft', and 'Cancel' are at the bottom.
- Center Panel (Document Content):** Displays the document text, including patient details, dates, and a procedure description. Annotations include:
  - 'Complete as per the document displaying to the right' pointing to the top of the document content.
  - 'File name and copy link' pointing to the document title 'TJ Cardiology (8).pdf'.
  - 'Show comments / Show highlights' pointing to the toggle buttons above the document content.
- Right Panel (Actions and Controls):** Contains a vertical toolbar with icons for document actions and controls. Annotations include:
  - 'Document Actions' pointing to the top part of the toolbar.
  - 'Document Controls' pointing to the bottom part of the toolbar.

3. The **Activity** tab displays the audit trail of actions for this document, for example:



The screenshot shows the 'Activity' tab of the document interface, displaying a list of actions:

- AR** Dr Alison Rowan viewed this document  
12-Jul-2023, 15:55
- MM** Mireille Medhat viewed this document  
11-Jul-2023, 08:09
- MM** Mireille Medhat added  
Orthopaedi... .pdf (Ver 1)  
11-Jul-2023, 08:09

4. Select **Close Preview** or  to return to the **DocHub Home** screen.

## Summarising a Document

 **Note** - Only available to **Patient Documents** as set in **Document classification**.

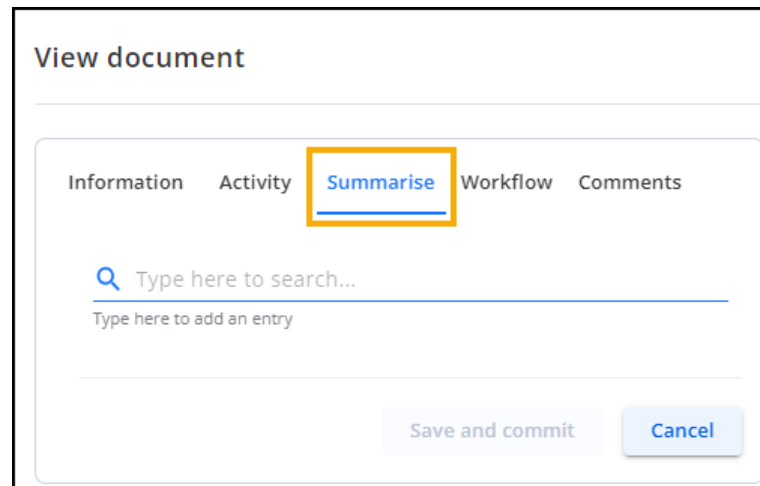
To summarise a filed document:

1. From **DocHub**, select **Filed** from the **Side Navigation Bar**.



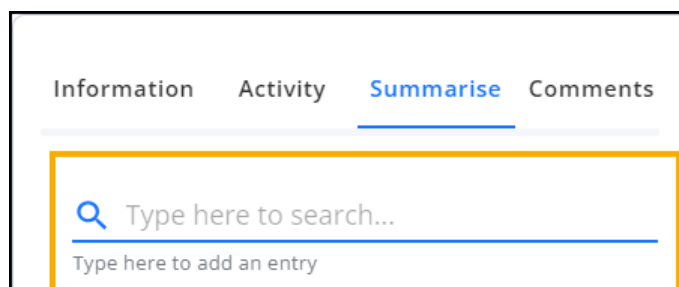
**Training Tip** - You can sort the documents into any order by selecting a column header to order them by.

2. Select the document name to display a preview.
3. Select the **Summarise** tab and allocate clinical terms relating to this document. The first time you select the **Summarise** tab it is in edit mode, after that you must select **Edit** to add or update any clinical terms:




The screenshot shows a 'View document' window with a tabbed interface. The tabs are 'Information', 'Activity', 'Summarise', 'Workflow', and 'Comments'. The 'Summarise' tab is selected and highlighted with a yellow box. Below the tabs is a search bar with a magnifying glass icon and the text 'Type here to search...'. Below the search bar is a text input field with the placeholder text 'Type here to add an entry'. At the bottom right of the window are two buttons: 'Save and commit' and 'Cancel'.

4. To add a clinical term, start entering the term required above **Type here to add an entry**:



This screenshot is similar to the previous one, but the 'Summarise' tab is underlined with a blue line. The text input field 'Type here to add an entry' is highlighted with a yellow box, indicating where to enter a clinical term.

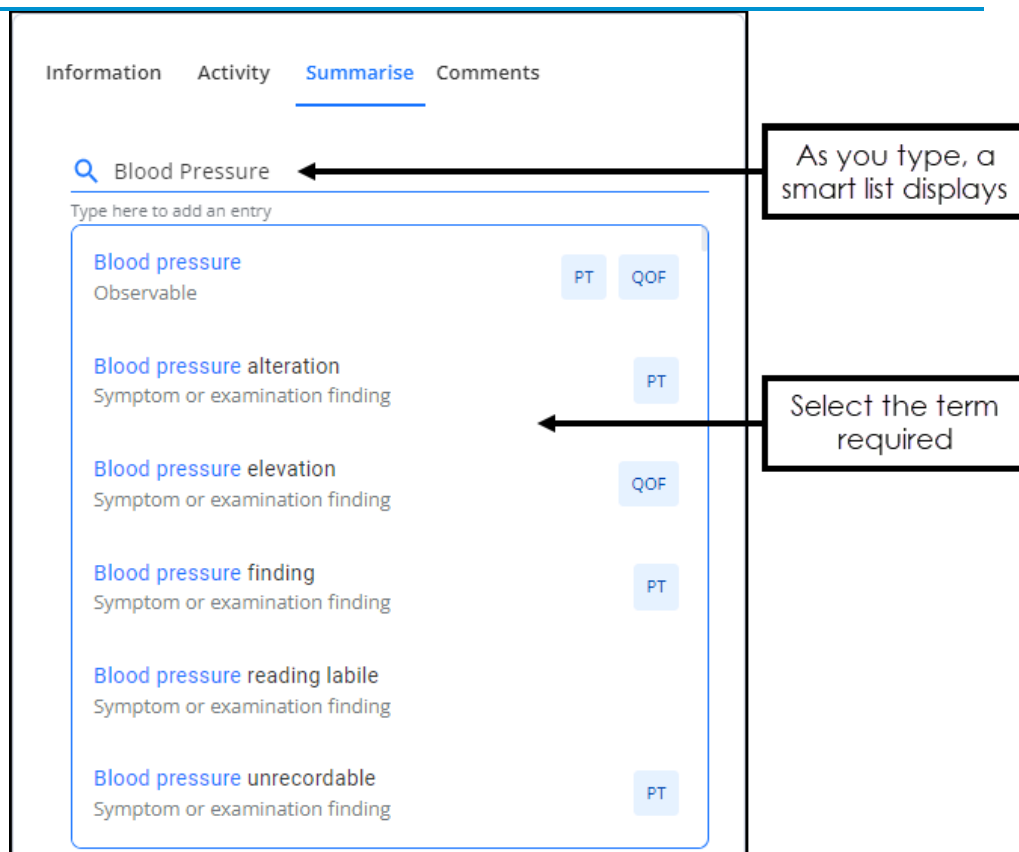


**Training Tip** - If you have already added clinical terms to this document, you must select **Edit**  before you can add more.

5. Select the term required from the smart list:



**Training Tip** - Standard Vision Anywhere short cuts apply here, for example, enter a Blood Pressure result to trigger a **Blood Pressure** add form with the **Systolic** and **Diastolic** completed.



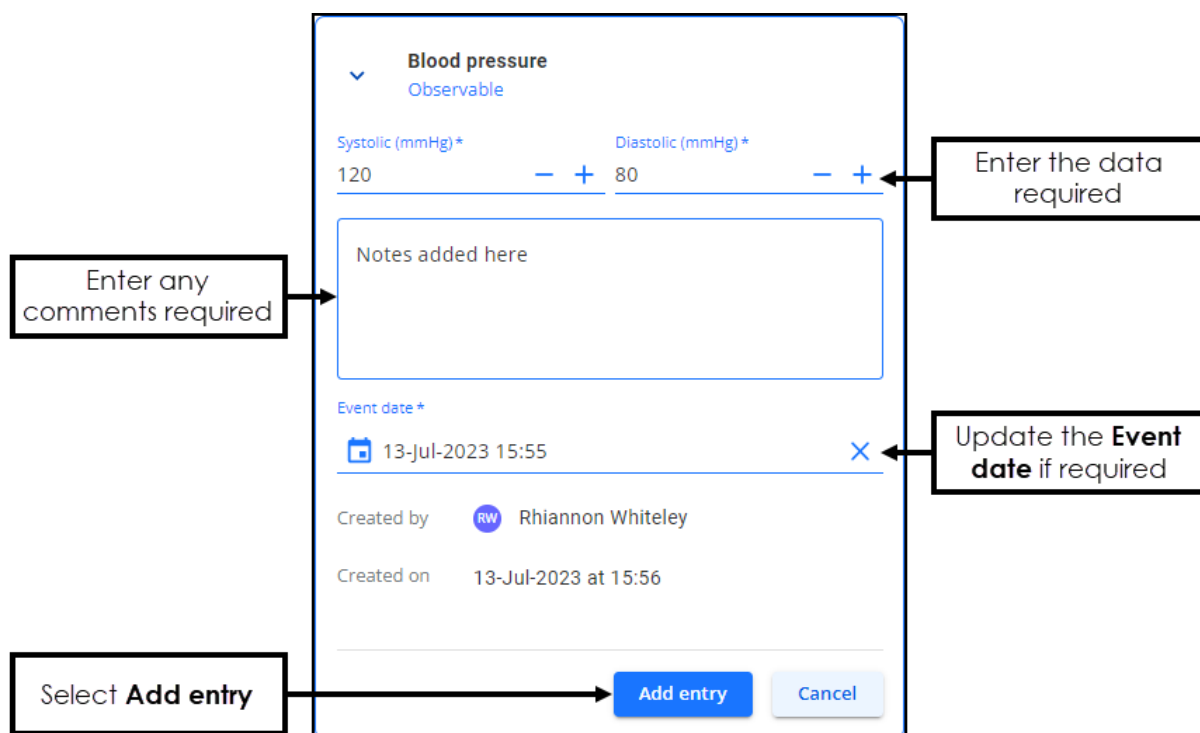
The screenshot shows a software interface with tabs for 'Information', 'Activity', 'Summarise', and 'Comments'. A search bar contains the text 'Blood Pressure'. Below the search bar is a dropdown list of search results:

- Blood pressure** (Observable) with buttons for PT and QOF
- Blood pressure alteration** (Symptom or examination finding) with a button for PT
- Blood pressure elevation** (Symptom or examination finding) with a button for QOF
- Blood pressure finding** (Symptom or examination finding) with a button for PT
- Blood pressure reading labile** (Symptom or examination finding)
- Blood pressure unrecordable** (Symptom or examination finding) with a button for PT

Annotations on the right side of the screenshot include:

- A box labeled 'As you type, a smart list displays' with an arrow pointing to the search bar.
- A box labeled 'Select the term required' with an arrow pointing to the 'Blood pressure alteration' result.

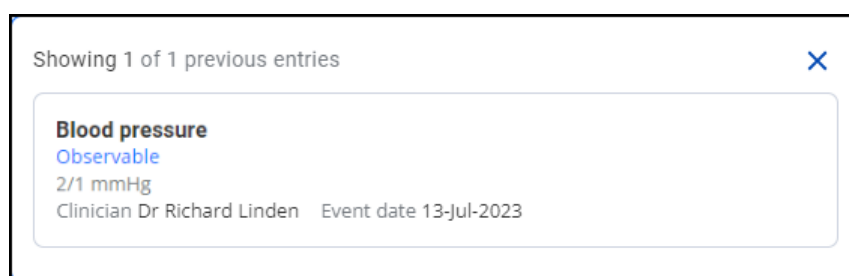
6. Depending on the clinical term selected, an appropriate **Add entry** form displays:



The screenshot shows the 'Add entry' form for 'Blood pressure' (Observable). The form includes fields for Systolic (mmHg)\* (120) and Diastolic (mmHg)\* (80), a 'Notes added here' text area, an 'Event date\*' field (13-Jul-2023 15:55), and a 'Created by' field (Rhiannon Whiteley). At the bottom, there are 'Add entry' and 'Cancel' buttons. Callout boxes point to the data fields, the notes area, the event date field, and the 'Add entry' button.

Complete as per the document you are summarising, the entry details depend on the clinical code you have selected.

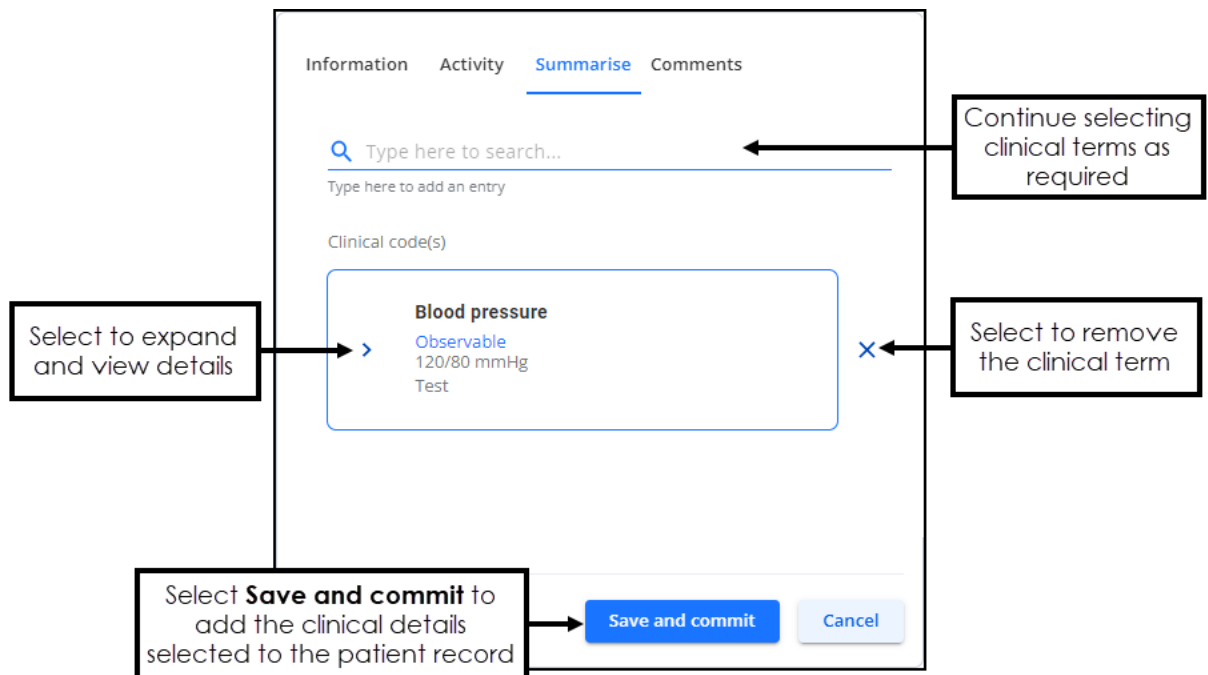
***n* Previous entries** 1 previous entries View (where *n* is the number of entries) - This banner displays if there are similar records on the selected patient record. Select **View** to display the records:



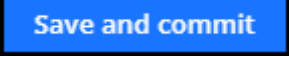

The banner shows 'Showing 1 of 1 previous entries' and a list item for 'Blood pressure' (Observable) with a value of '2/1 mmHg', created by 'Clinician Dr Richard Linden' on 'Event date 13-Jul-2023'.

7. Select **Add entry** Add entry.

8. Repeat from step 4 until all the clinical terms required and related comments are added:

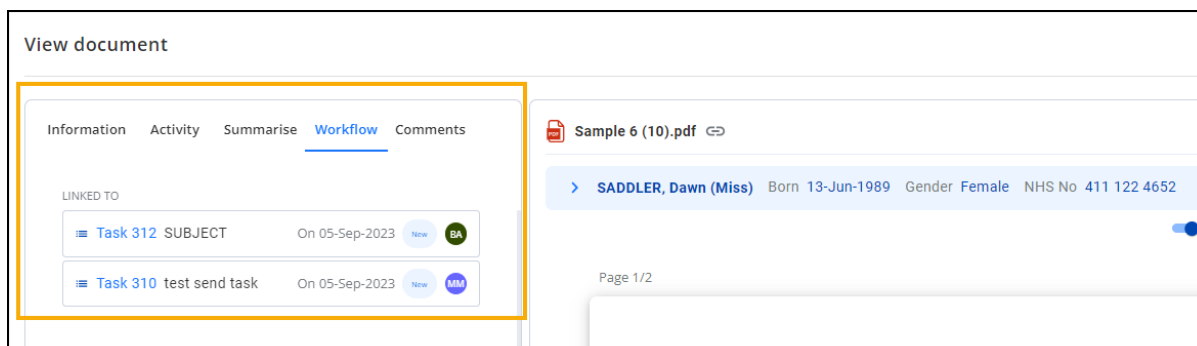


**Training Tip** - Select **Clear**  to remove a clinical term from the document and the patient record.

9. Select **Save and commit**  to update the patient clinical record.
10. Select **Close Preview** or  to return to the **DocHub Home** screen.

## Workflow Documents

**DocHub** works seamlessly with the **Cegedim Healthcare Solutions Tasks** application. The **Workflow** tab displays all Tasks linked to the current document, with the most recently created at the top of the list:



The following task information displays:

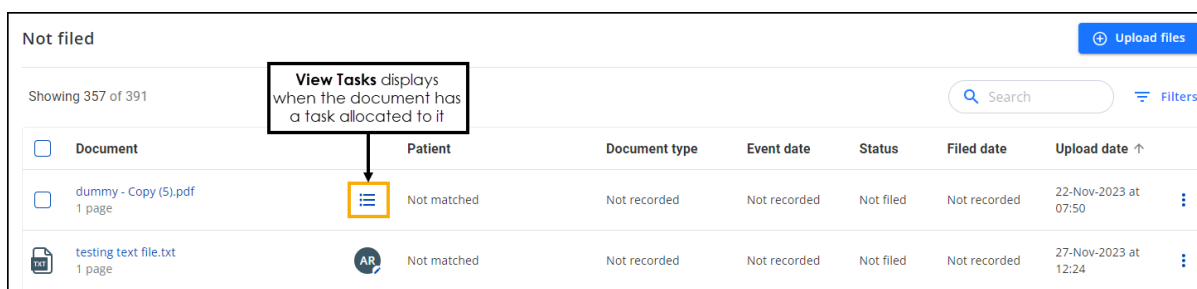
- Task ID
- Subject
- Created Data
- Status
- Assignee initials





To assign a Task to a document, see [Creating a Task](#) on page [36](#).

Documents that have been through the workflow process display with **View**

**Tasks**  in the document list:

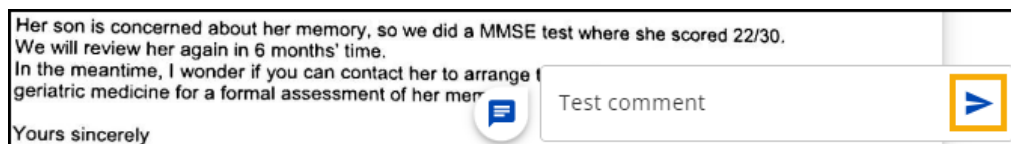


Document	Patient	Document type	Event date	Status	Filed date	Upload date ↑
<input type="checkbox"/> dummy - Copy (5).pdf 1 page	 Not matched	Not recorded	Not recorded	Not filed	Not recorded	22-Nov-2023 at 07:50
<input checked="" type="checkbox"/> testing text file.txt 1 page	 Not matched	Not recorded	Not recorded	Not filed	Not recorded	27-Nov-2023 at 12:24


## Adding a Comment

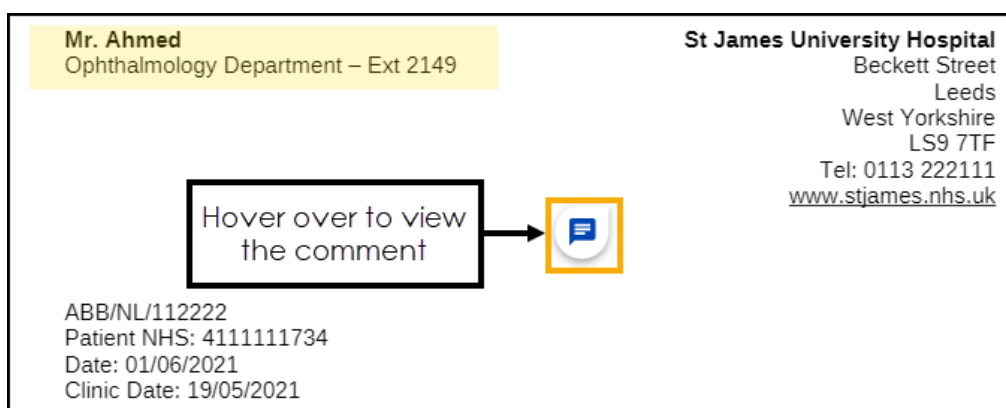
To add a comment to a document:

1. Select **Comment**  to add a comment to the document. Select in the document where you would like the comment, add the comment text required and select **Send** :



The comment is added to the document.

To view an existing comment, simply hover over the **Existing Comment** icon  on the document:



The comment displays with the date and time it was added:





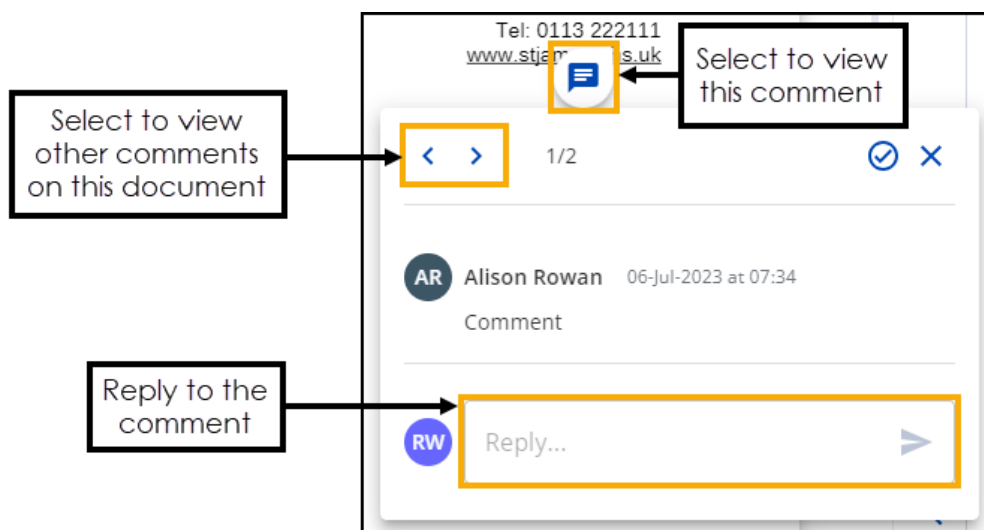
## Viewing and Resolving Comments on a Document


### Viewing Comments

To view comments on a document:

When in **View document** or **Edit document** view, either:

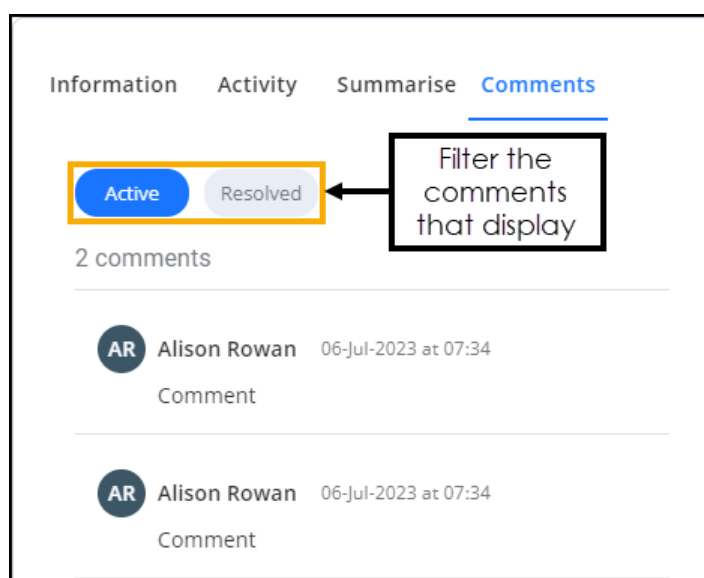
- Select **Existing Comment**  on the document. The comment displays:



If there are multiple comments you can use the arrows  to view the next or previous comments in the document.

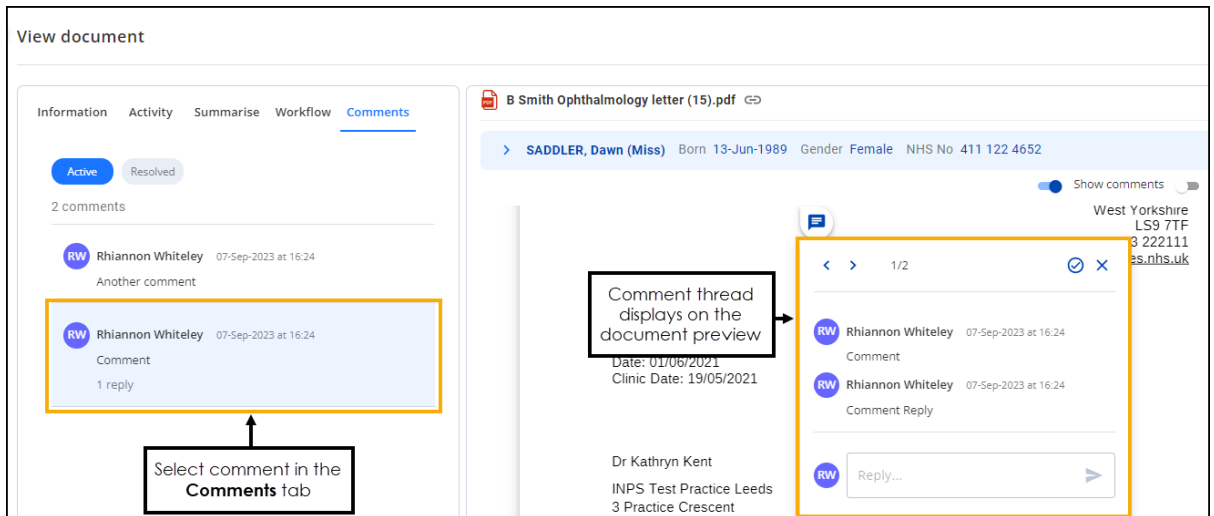
Enter your response in **Reply....**

- Select the **Comments** tab from the **Document data** section:




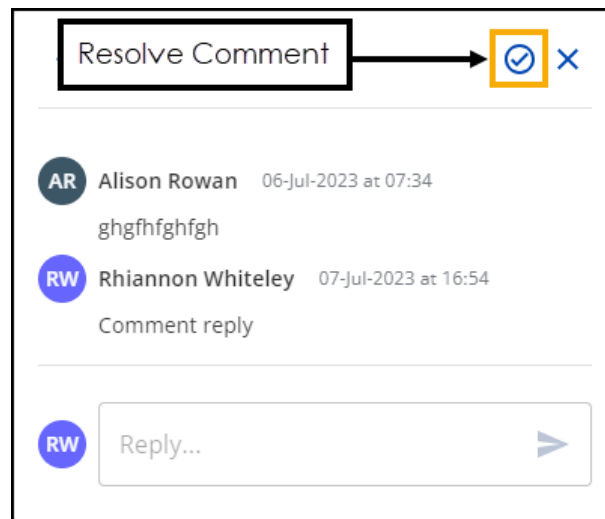
All comments in the document display, you can filter either by **Active** or **Resolved** comments.

Select the comment to view the thread on the document itself:



## Resolving Comments

You can easily resolve and remove comments from a document, simply, view the comment on the document and then select **Resolve** .




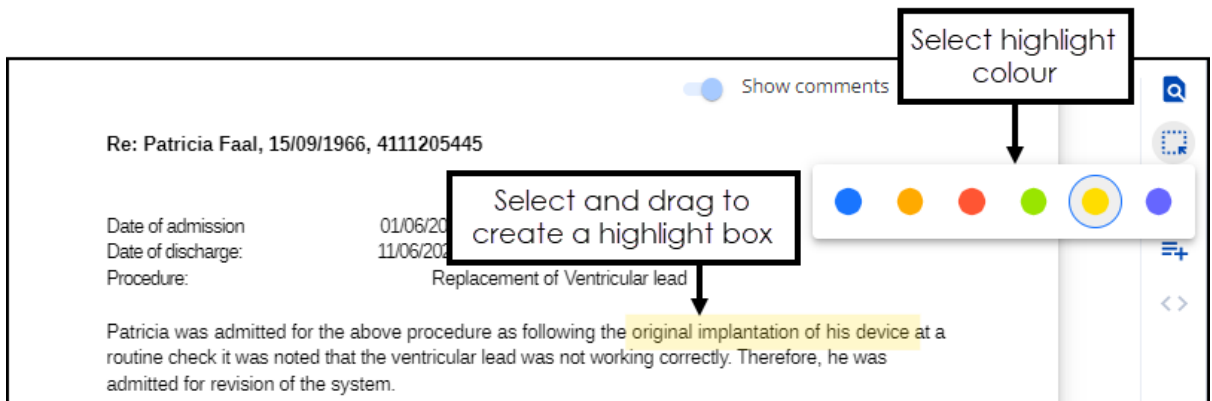
Resolved comments can be viewed from the **Document Data - Comments** screen:



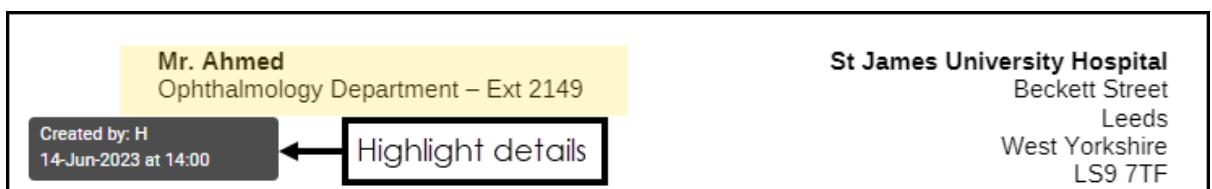
## Adding a Highlight

To add a highlight to a document:

- Hover over **Highlight** , select a highlight colour option, and then select and drag the cursor to create a highlight box:









- Hover over an existing highlight to display who created it and when:



## Creating a Task

To create a task for a document:

1. Select **Document actions**  at the end of a document row, in any document folder to open the **Document actions** menu:

<input type="checkbox"/>	Document	Patient	Document type	Event date	Status	Filed date ↓	Upload date
	file this docc (2).png 1 page	JACK, Kathy (Ms) NHS 411 122 1262	Clinical letter	Not recorded	Filed	25-Jul-2023 at 19:33	25-Jul-2023 at 19:28
	file this docc (1).png 1 page	JACK, Kathy (Ms) NHS 411 122 1262	Clinical letter	Not recorded	Filed	25-Jul-2023 at 19:33	
	file this doc.png 1 page	JACK, Kathy (Ms) NHS 411 122 1262	Clinical letter	Not recorded	Filed	25-Jul-2023 at 19:33	
	271438-nature-landscape-path-...).jpg 1 page	ABALUNAM, A (Miss) NHS 411 123 1284	Clinical letter	Not recorded	Filed	25-Jul-2023 at 13:47	
	file-sample_100kB 1 (32).rtf 4 pages	NANGLE, Geraint (Mr) NHS 411 120 7189	Administrative letter	05-Jun-2023	Filed	06-Jun-2023 at 13:40	10:40

Document actions

View document

Edit document data

**Create Task**

Download image

Print document

Select **Create Task**

2. Select **Create Task**.
3. The **Task** screen displays:

☰ Task

Patient Details

**BLACKMAN, Susan (Ms)**  
Born 03-Sep-1954 Gender Female NHS No 411 122 3397

DETAILS

Recipients \* ▼


---

Subject \* 0/30

---

Category ▼

---

Due date and time \*  
 DD-Mon-YYYY HH:mm

---

Additional notes...


0/1000

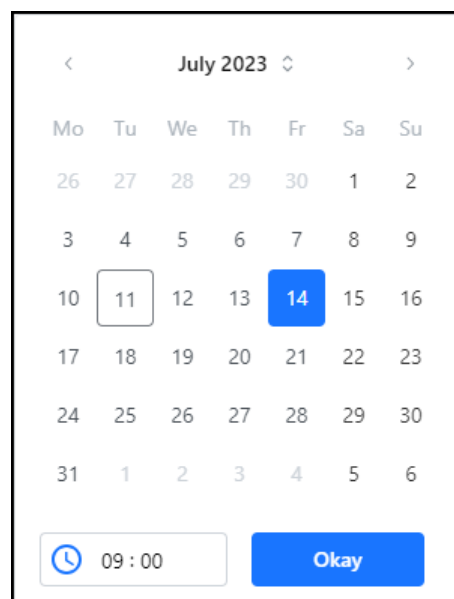
LINKED TO

Send Task
Cancel

 **Note** - The **Patient Details** section only displays for documents that are filed.

Complete as follows:


- **DETAILS:**
  - **Recipients** - Select the recipient of this Task, this can be one or more individual members of staff, yourself to act as an aid memoir or a staff group, simply start typing and a smart list displays to select from.
  - **Subject** - Enter a short description of the task, up to 30 characters.
  - **Category** - Select a category from the list provided.
  - **Due date and time** - Enter the date and time that this task should be completed by, using the format DD-MM-YYYY HH:mm, or select **Calendar**  to open a date and time picker:



- **Additional Notes** - Enter any additional notes.
- **LINKED TO** - Displays the details of the document that this Task is linked to.
- **STATUS:**
  - **Priority** - Select from:
  - **Routine** - Tick if this Task should be marked as routine.
  - **Urgent** - Tick if this Task should be marked as urgent.
  - **Urgent when overdue** - Tick if the priority of this Task should increase when overdue.

- **Task contains sensitive information** - Tick to mark a Task as sensitive, if selected only the sender, recipients and system supervisors can see the full details of the Task.

---

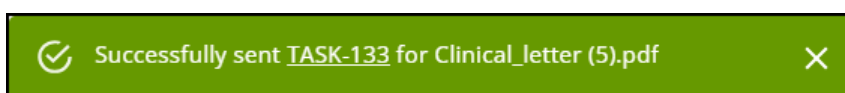
 **Important** - Ensure you do not include sensitive data in **Subject** as this may inadvertently be seen by unauthorised staff.

---

- **All recipients must complete** - If this Task is going to a group of recipients, tick to request they all complete the task as opposed to just one of them.
- **Notify me when complete** - Tick to receive a notification when this Task is complete.


4. Select **Send Task** to send the Task to the recipient.




A banner displays when the Task is successful:




The recipient is notified of the Task in **Tasks**.

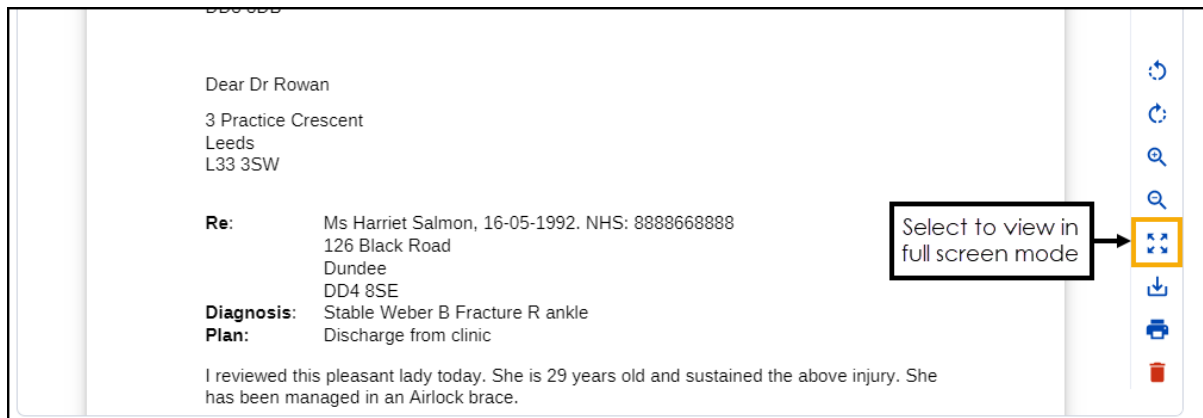
Documents that have been through the workflow process display with **View**

**Tasks**  in the document list:

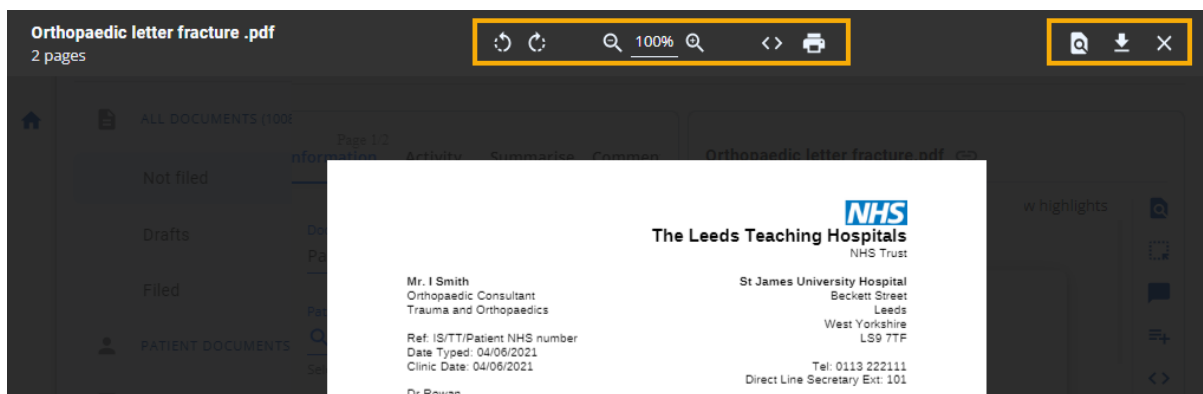
Not filed								Upload files	
Showing 357 of 391								Search	Filters
<input type="checkbox"/>	Document	Patient	Document type	Event date	Status	Filed date	Upload date ↑		
<input type="checkbox"/>	dummy - Copy (5).pdf 1 page		Not matched	Not recorded	Not recorded	Not filed	Not recorded	22-Nov-2023 at 07:50	⋮
	testing text file.txt 1 page		Not matched	Not recorded	Not recorded	Not filed	Not recorded	27-Nov-2023 at 12:24	⋮

## Full Screen Mode










To view a document in full screen mode, select **Fullscreen**  from the document controls section:




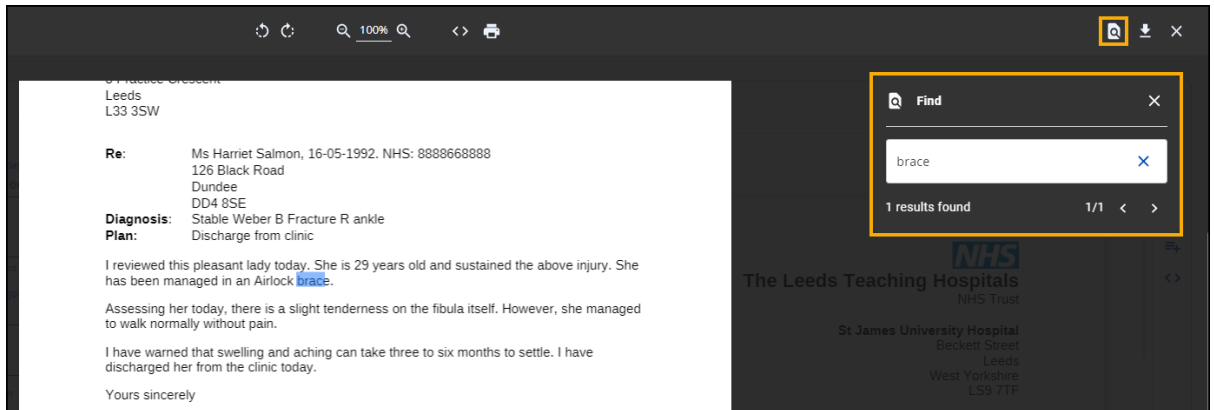
The document displays in full screen mode:





You have the following options:

-  /  **Rotate left/Rotate right** - Especially useful for images, you can use this to rotate the document through 90 degrees at a time either clockwise or counter clockwise.
-  /  **Zoom out/Zoom in** - Select the **Minus -** to reduce the size of the document or **Plus +** to enlarge the document. The percentage value in the middle displays the changes you make.
-  /  **Paginate/Scroll** - Select to either view a page at a time or be able to scroll through all pages.
-  **1**  **Previous/Next pages** - Only available if you have **Paginate** selected above, use the left or right arrows to switch between the pages that display.
-  **Print** - Select to print the document.

- 
**Find** - Select to search for specific text in the document. The **Find** screen displays, enter your search criteria into **Search document**, the document highlights as you type. Use the arrows to scroll through the results:



- 
**Download** - Select to download the selected document. To view the **Downloads** folder, open **Windows File Explorer**, and then locate and select **Downloads**. A list of your recently downloaded files display.
- 
**Close** - Select to close the full screen mode.

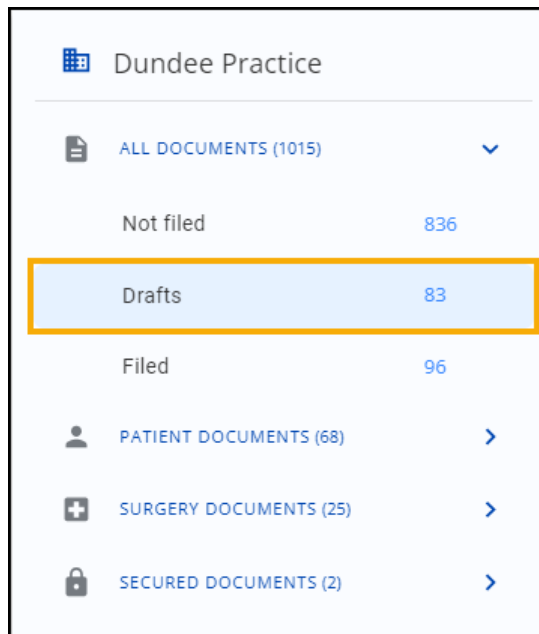


## Draft Documents

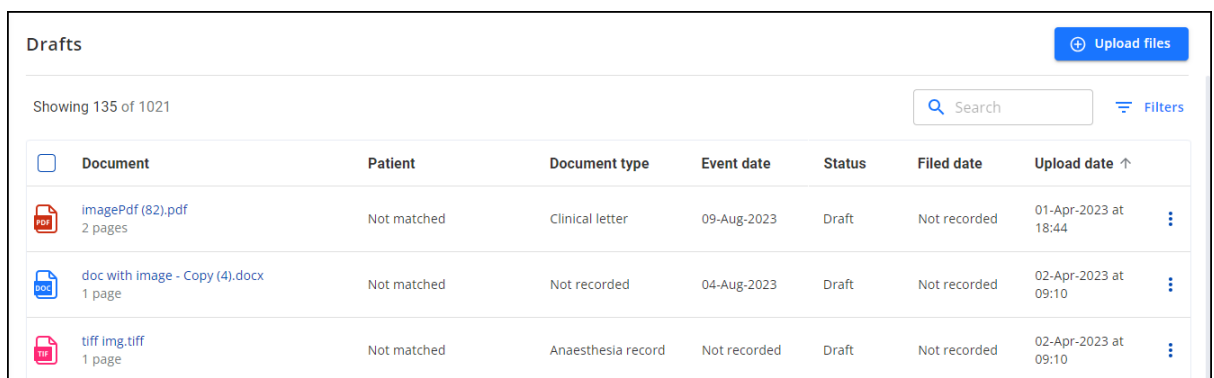
The **Draft** folder displays documents that are not filed and have been saved as draft:




To access **Drafts** folder:

1. From the **Side Navigation Bar** select **Drafts**:




2. The **Drafts** screen displays:



Document	Patient	Document type	Event date	Status	Filed date	Upload date ↑
 imagePdf (82).pdf 2 pages	Not matched	Clinical letter	09-Aug-2023	Draft	Not recorded	01-Apr-2023 at 18:44
 doc with image - Copy (4).docx 1 page	Not matched	Not recorded	04-Aug-2023	Draft	Not recorded	02-Apr-2023 at 09:10
 tiff img.tiff 1 page	Not matched	Anaesthesia record	Not recorded	Draft	Not recorded	02-Apr-2023 at 09:10







From here you can:

- Search for or sort documents, see [Searching for and Sorting Documents](#) on page **59** for details.
- Filter the documents that display, see [Using Filters in DocHub](#) on page **57** for details.

3. Select **Documents actions**  at the end of a document row to view the options:

Drafts Upload files

Showing 135 of 1021 Search Filters

<input type="checkbox"/>	Document	Patient	Document type	Event date	Status	Filed date	Upload date ↑
	imagePdf (82).pdf 2 pages	Not matched	Clinical letter	09-Aug-2023	Draft	Not recorded	01-Apr-2023 at 18:44
	doc with image - Copy (4).docx 1 page	Not matched	Not recorded	04-Aug-2023	Draft	Not recorded	
	tiff img.tiff 1 page	Not matched	Anaesthesia record	Not recorded	Draft	Not recorded	
	columns.tif 1 page	Not matched	Administrative letter	05-Sep-2023	Draft	Not recorded	
	uuuuuuuuuuuuuuuuuuuuuu... u.tif 1 page	 HEAD, Mandy (Ms) NHS 411 119 6047	Administrative letter	03-Jul-2023	Draft	Not recorded	

Document actions

View document

Edit document data

Create Task

Download as PDF

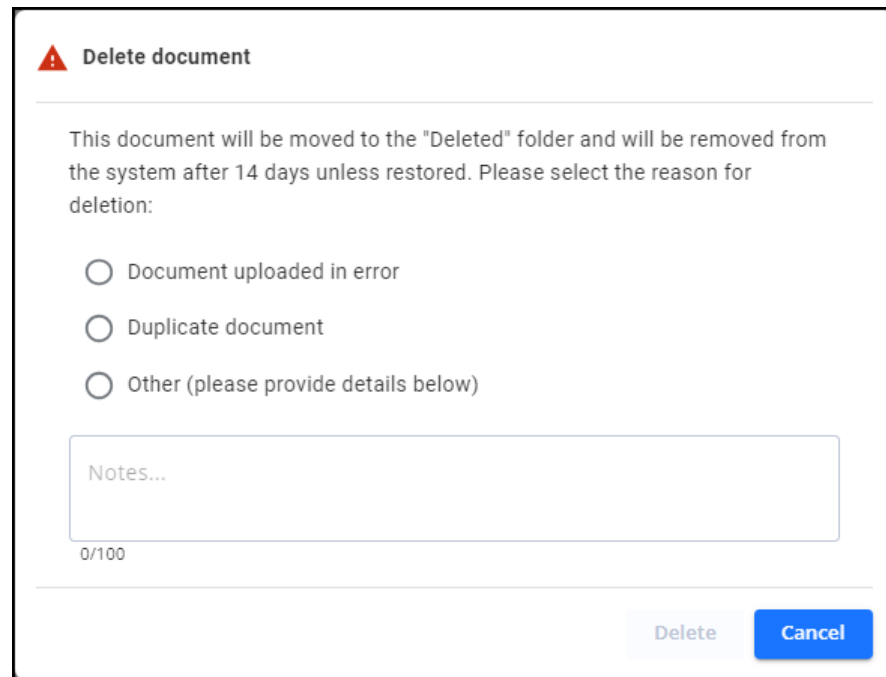
Print document

Delete

You have the following options:

- **View document** - Select to display the document. See [Processing Documents](#) on page 17 for details.
- **Edit document data** - Select to update the document. See [Processing Documents](#) on page 17 for details.
- **Create Task** - Select to create a Task for the document. See [Creating a Task](#) on page 36 for details.
- **Download as PDF** - Select to download the selected document as a PDF. To view the **Downloads** folder, open **Windows File Explorer**, then locate and select **Downloads**. A list of your recently downloaded files display.
- **Download image** - Select to download the selected image. To view the **Downloads** folder, open **Windows File Explorer**, and then locate and select **Downloads**. A list of your recently downloaded files display.
- **Print document** - Select to print the selected document.

- **Delete** - Only available for **Not filed** and **Draft** documents. Select to delete the selected document and the **Delete document** screen displays. Select a deletion reason, add any notes required and then select **Delete**:



The screenshot shows a dialog box titled "Delete document" with a warning icon. The text inside reads: "This document will be moved to the 'Deleted' folder and will be removed from the system after 14 days unless restored. Please select the reason for deletion:". Below this text are three radio button options: "Document uploaded in error", "Duplicate document", and "Other (please provide details below)". Under the "Other" option is a text input field with the placeholder "Notes..." and a character count "0/100". At the bottom right of the dialog are two buttons: "Delete" (disabled) and "Cancel" (active).

The deleted documents are stored in the **Deleted documents** folder for 14 days, after this time, unless they are restored, the documents are deleted from the system.

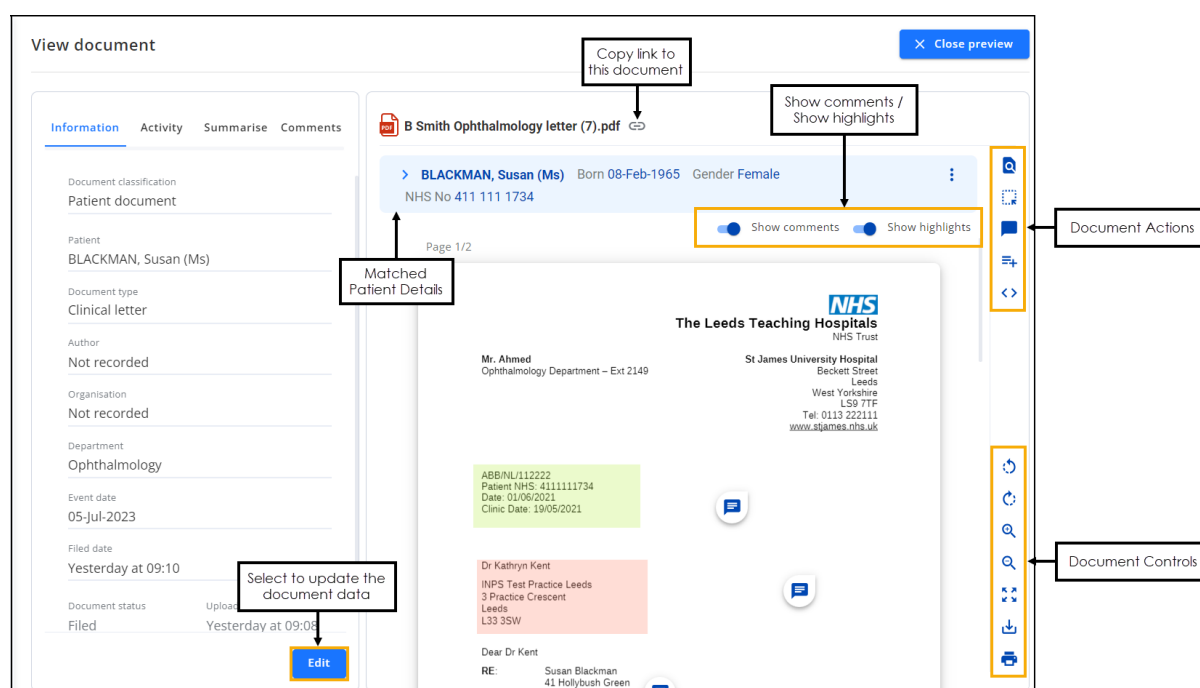
## Viewing Filed Documents

To find and view filed documents:

From **DocHub**, select the document required, if you are not sure where the document is, select **All Documents** from the pane on the left side of your screen and then find the document required using either:




- **Filters** - Utilise the available filters, see [Using Filters in DocHub](#) on page 57 for details, or
- **Search** or **Sort** - Enter your search criteria or sort the documents, see [Searching for and Sorting Documents](#) on page 59 for details.





The document displays, the **Document Data** from the document displays on the left and the actual document on the right:




The following option may assist in the viewing of a document on your screen:

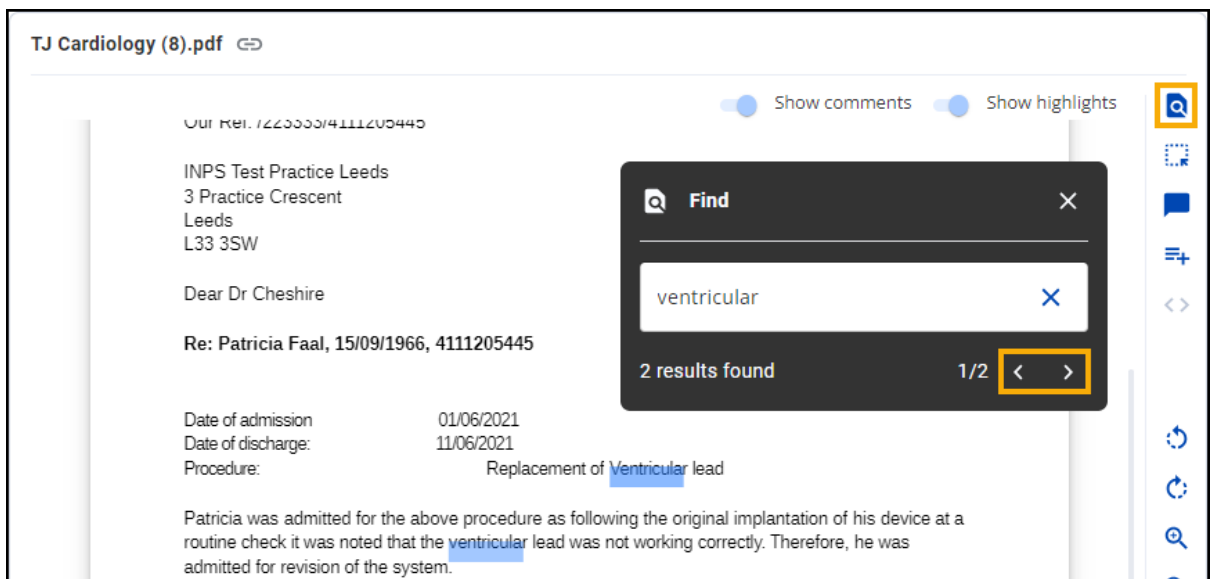
### Document Controls

-  **Rotate left** - Especially useful for images, you can use this to rotate the document through 90 degrees at a time either clockwise or counter clockwise.
-  **Rotate right** - Especially useful for images, you can use this to rotate the document through 90 degrees at a time either clockwise or counter clockwise.
-  **Zoom in** - Select the **Minus -** to reduce the size of the document or **Plus +** to enlarge the document. The percentage value in the middle displays the changes you make.

- 
**Zoom out** - Select the **Minus -** to reduce the size of the document or **Plus +** to enlarge the document. The percentage value in the middle displays the changes you make.
- 
**Fullscreen** - Select to display the document in a full screen format. See **Full Screen Mode** on page **38** for details.
- 
**Download** - Select to download the selected document. To view the **Downloads** folder, open **Windows File Explorer**, and then locate and select **Downloads**. A list of your recently downloaded files displays.
- 
**Print** - Select to print the document.

## Document Actions


- 
**Find** - Select to search for specific text in the document. The **Find** screen displays, enter your search criteria into **Search document**, the document highlights as you type. Use the arrows to scroll through the results:



The screenshot shows a PDF viewer interface for a document titled "TJ Cardiology (8).pdf". The document content includes:

- Our Ref: 7223333/4111205445
- INPS Test Practice Leeds  
3 Practice Crescent  
Leeds  
L33 3SW
- Dear Dr Cheshire
- Re: Patricia Faal, 15/09/1966, 4111205445
- Date of admission: 01/06/2021
- Date of discharge: 11/06/2021
- Procedure: Replacement of **Ventricular** lead
- Patricia was admitted for the above procedure as following the original implantation of his device at a routine check it was noted that the **ventricular** lead was not working correctly. Therefore, he was admitted for revision of the system.

A search overlay titled "Find" is active, showing the search term "ventricular" and "2 results found". The overlay also displays "1/2" and navigation arrows. The document text "Ventricular" and "ventricular" are highlighted in blue. The PDF viewer interface includes a toolbar on the right with icons for search, zoom, and other actions.

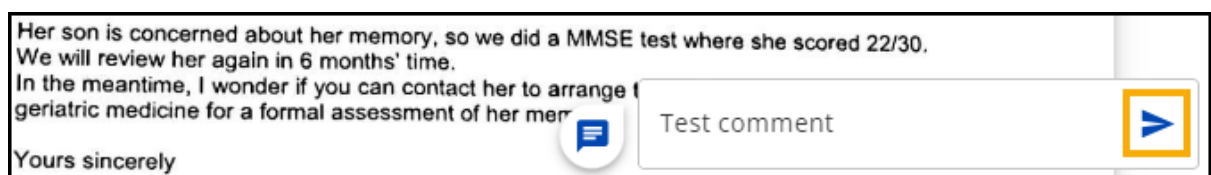
- 
**Highlight** - Select to highlight a block of text in the document. Hover over **Highlight** to select a highlight colour and then select and drag to create the highlight:



- Hover over a highlight, to view who created the highlight and when it was created.



 See [Adding a Highlight](#) on page **35** for details.

- 
**Comment** - Select to add a comment to the document. Enter the comment required and select **Send** :




The comment is added to the document.

 See [Adding a Comment](#) on page **31** for details.

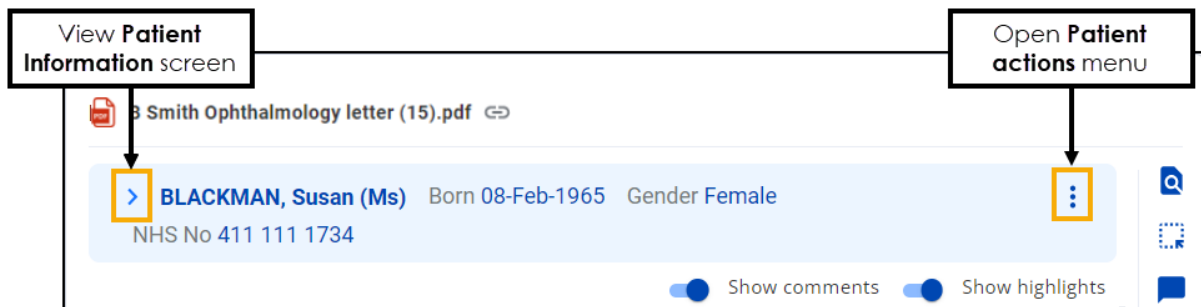
- 
**Create Task** - Select to create a Task for this document. See [Creating a Task](#) on page **36** for details.
- 
**Next page** - Select to move through the pages of a multi-page document.


## Show comments / Show highlights

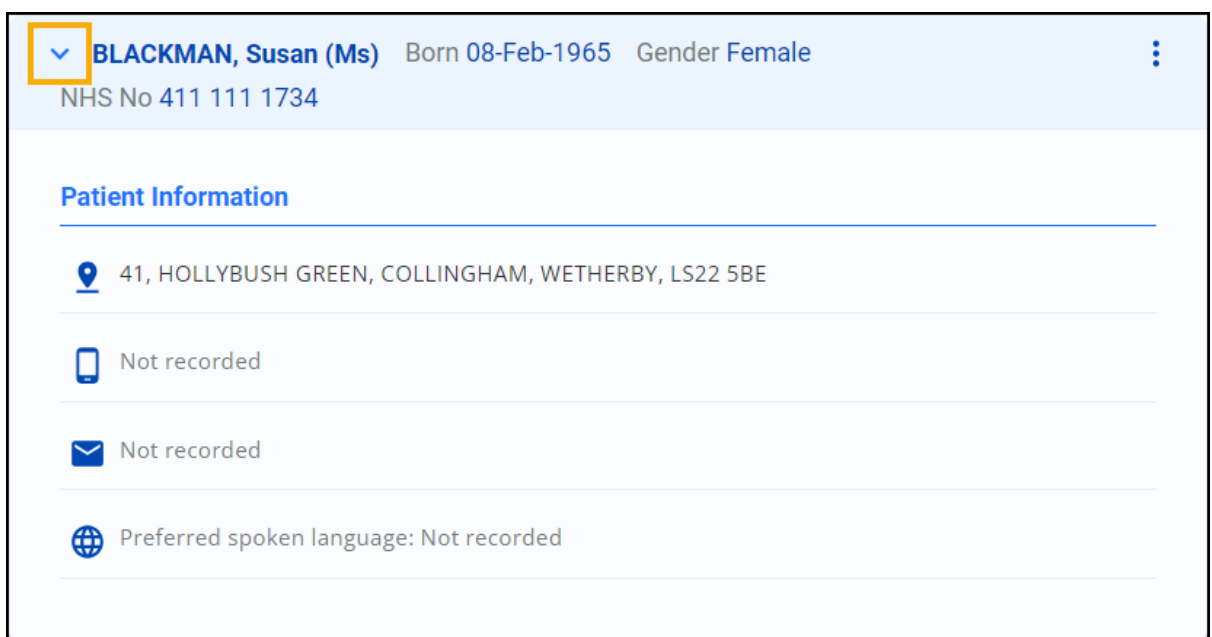
Slide the toggle to switch the comments and highlights **On**  or **Off** .

If there are no comments or highlights on the document the option is disabled .

From the matched patient details, you can select:

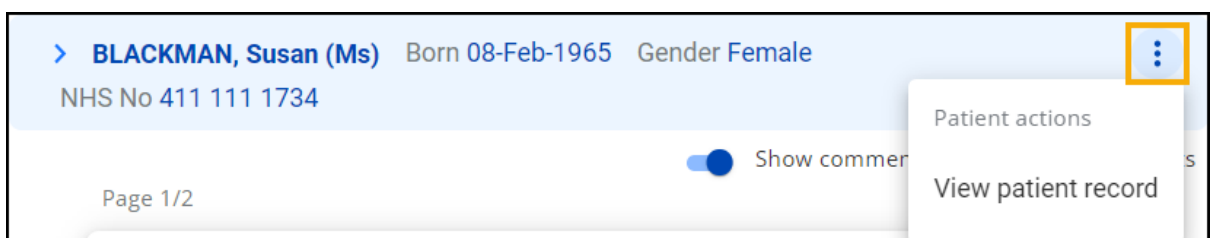


-  **Patient Information** - To view the **Patient Information** screen. This displays the patient's address, phone number, email and preferred spoken language:



Select  to close the **Patient Information** screen.

-  **Patient actions** - To open **Patient actions** options, select **View patient record** to launch the patient's record in **Vision 3**:



You can now select **Edit**  to edit the document data as required, see [Editing Filed Documents](#) on page 48 for details.

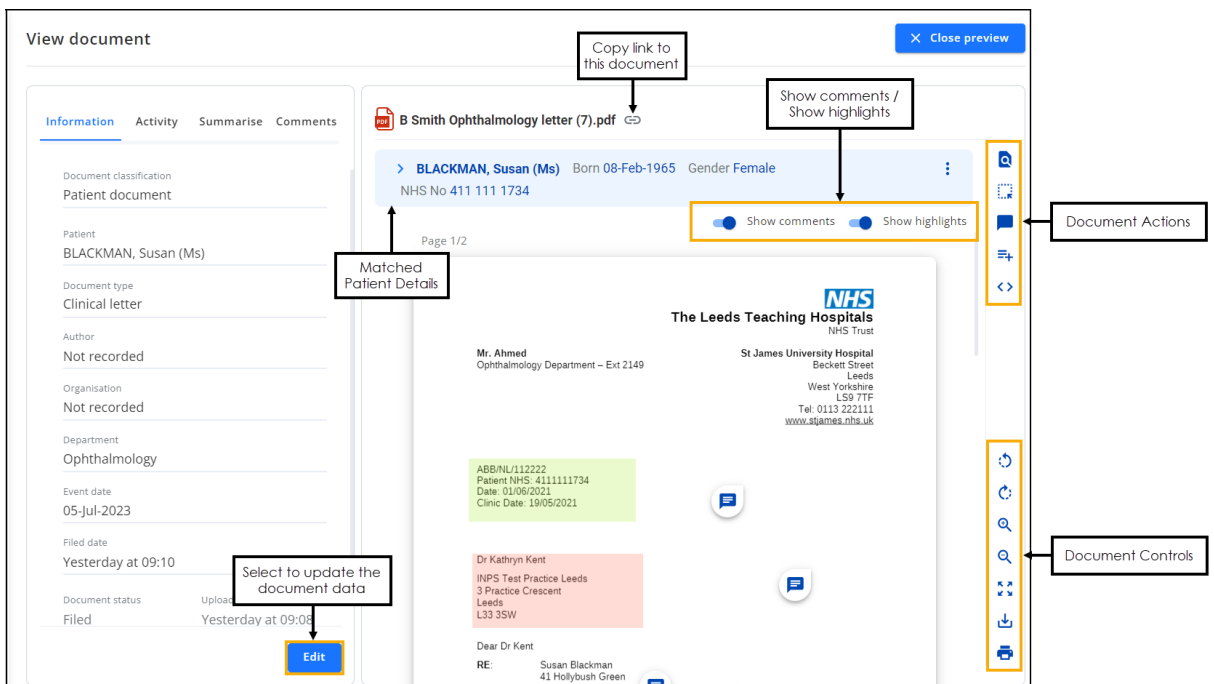
## Editing Filed Documents

To edit a filed document:

1. Search for and locate the filed document. If you are not sure where the document is, select **All Documents** from the pane on the left side of your screen and then find the document required using the sort or filter function.




 See [Searching for and Sorting Documents](#) on page 59 or [Using Filters in DocHub](#) on page 57 for details.

2. Select the document name to display a preview:





You can now update the document data using the following tabs:

- **Information** - Select **Edit**  to change the document data on this tab, see [Filing a Document](#) on page **23** for details.
  - **Activity** - Select to view the document activity/audit trail, see [Viewing Document Activity](#) on page **26** for details.
  - **Summarise** - Select to allocate clinical terms relating to this document. The first time you select the **Summarise** tab it is in Edit mode, after that you must select **Edit**  to add or update any clinical terms. See [Summarising a Document](#) on page **27** for details.
  - **Workflow** - Select to view the workflow items/Tasks linked to this document. See [Workflow Documents](#) on page **31** for details.
  - **Comments** - Select to view the active and resolved comments on the document. See [Viewing and Resolving Comments on a Document](#) on page **33** for details.
3. Select **Close Preview** or  to return to the **DocHub Home** screen.

## Remove a Patient from a Filed Document

To remove an incorrectly attached patient from a filed document:

1. From **DocHub**, select **Filed** from the **Side Navigation Bar**.

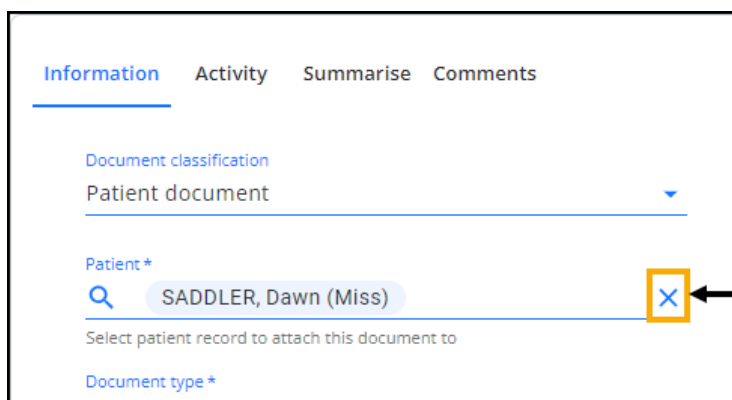


**Training Tip** - You can sort the documents into any order by selecting a column header to order them by.

2. Select the document name to display a preview.

3. On the **Information** tab, select **Edit** .

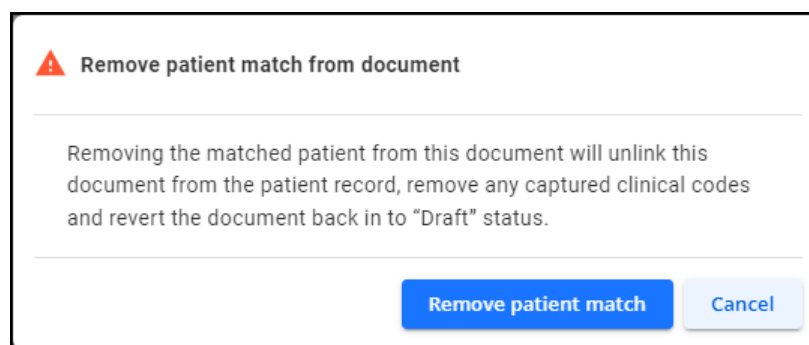
4. Select **Clear**  next to the patient's name:




Select to remove the matched patient

5. Select **Save changes** .


6. A 'Remove patient match from document warning' displays:









Select **Remove patient match**  to continue.

The document is unlinked from the patient record, captured clinical codes are removed and the document changes to a status of **Draft**.


## Document Actions Menu

Select **Document actions**  at the end of a document row, in any document folder to view the options:

Document	Patient	Document type	Event date	Status	Filed date	Upload date ↑
 271438-nature-landscape-path-mis... .jpg 1 page	Not matched	Not recorded	Not recorded	Not filed	Not recorded	02-Apr-2023 at 10:46 
 271438-nature-landscape-path-mis... .jpg 1 page	Not matched	Not recorded	Not recorded	Not filed	Not recorded	
 271438-nature-landscape-path-mis... .jpg 1 page	Not matched	Not recorded	Not recorded	Not filed	Not recorded	
 271438-nature-landscape-path-mis... .jpg 1 page	Not matched	Not recorded	Not recorded	Not filed	Not recorded	
 271438-nature-landscape-path-mis... .jpg 1 page	Not matched	Not recorded	Not recorded	Not filed	Not recorded	


Document actions

- View document
- Edit document data
- Create Task
- Download image
- Print document
- Delete

 **Note - Document actions** is not available if someone else is currently accessing the document.

Select from the following:

- **View document** - Select to view the document for filed documents and select to edit the document for documents that are yet to be filed.

 See [Viewing Filed Documents](#) on page **44** and [Processing Documents](#) on page **17** for details.

- **Edit document data** - Select to edit the document.

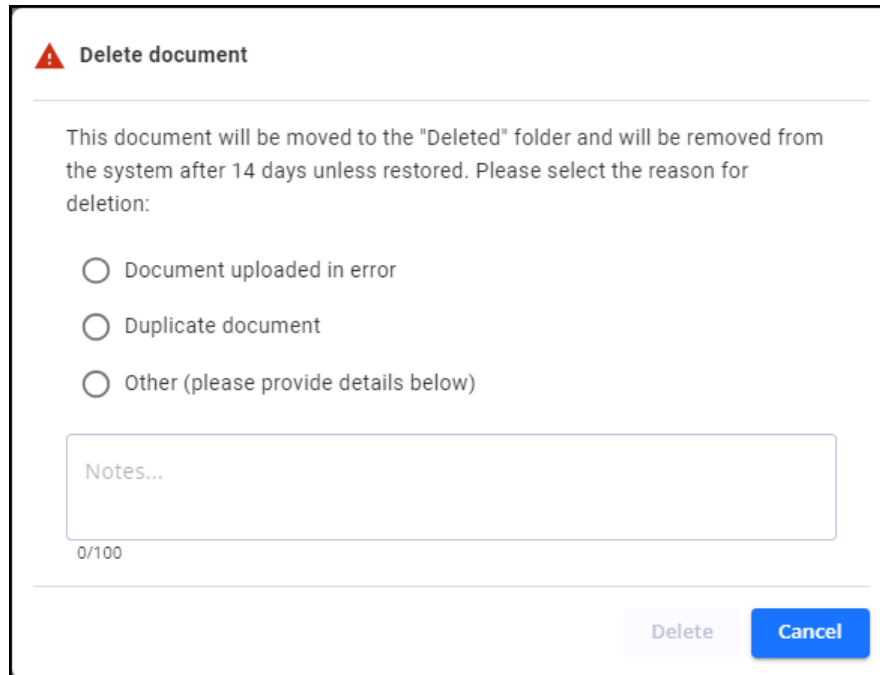
 See [Processing Documents](#) on page **17** for details.

- **Create Task** - Select to create a task for the document.

 See [Creating a Task](#) on page **36** for details.

- **Download as PDF** - Select to download the selected document as a PDF. To view the **Downloads** folder, open **Windows File Explorer**, and then locate and select **Downloads**. A list of your recently downloaded files displays.
- **Download image** - Select to download the selected image. To view the **Downloads** folder, open **Windows File Explorer**, and then locate and select **Downloads**. A list of your recently downloaded files displays.
- **Print document** - Select to print the document.

- **Delete** - Only applicable for **Not filed** and **Draft** documents only. Select to delete the document, the **Delete document** screen displays, select the deletion reason, add any notes required and then select **Delete**:



The screenshot shows a dialog box titled "Delete document" with a warning icon. The text inside reads: "This document will be moved to the 'Deleted' folder and will be removed from the system after 14 days unless restored. Please select the reason for deletion:". Below this text are three radio button options: "Document uploaded in error", "Duplicate document", and "Other (please provide details below)". Under the "Other" option is a text input field labeled "Notes..." with a character count of "0/100". At the bottom right of the dialog are two buttons: "Delete" (disabled) and "Cancel" (active).

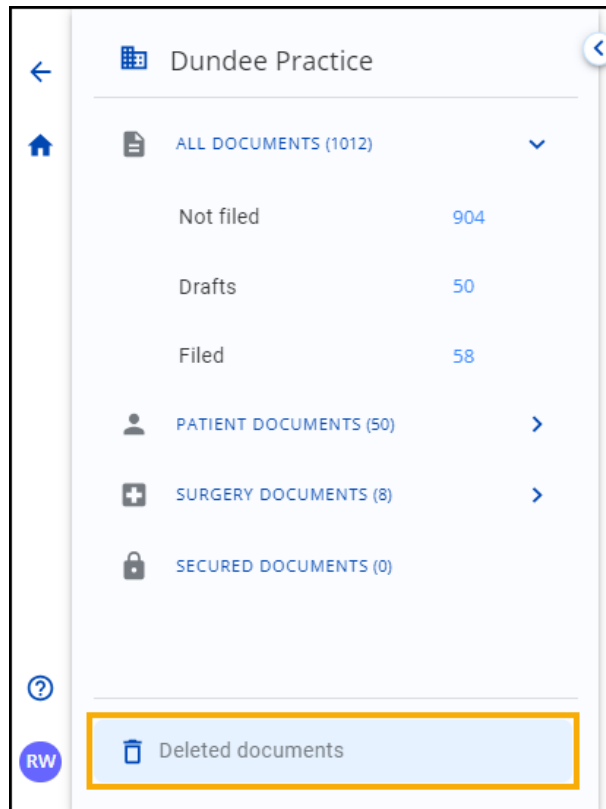
The deleted documents are then stored in the **Deleted documents** folder for 14 days, after this time, unless they are restored, the documents are deleted from the system.

## Deleted Documents




Deleted documents are stored in the **Deleted documents** folder for 14 days, after this time, unless they are restored, the documents are deleted from the system.

To access **Deleted documents** folder:

1. From the **Side Navigation Bar** select **Deleted documents**:




2. The **Deleted documents** screen displays:

Deleted documents								Upload files	
Showing 8 of 8								Search	Filters
<input type="checkbox"/>	Document	Patient	Document type	Event date	Status	Filed date	Upload date ↓		
	Sample 2 (12).pdf 2 pages	Not matched	Not recorded	Not recorded	Deleted	Not recorded	02-Apr-2023 at 10:55	⋮	
	271438-nature-lands... ).jpg 1 page	Not matched	Not recorded	Not recorded	Deleted	Not recorded	02-Apr-2023 at 10:46	⋮	
	Sample 7 - Copy (17).pdf 1 page	Not matched	Not recorded	Not recorded	Deleted	Not recorded	02-Apr-2023 at 10:46	⋮	

From here you have the option to:

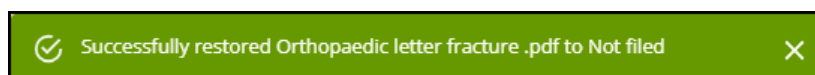
- Search for or sort documents, see [Searching for and Sorting Documents](#) on page 59 for details.
- Filter the documents that display, see [Using Filters in DocHub](#) on page 57 for details.

3. Select **Document actions**  at the end of a document row to view the options:

Deleted documents								<a href="#">Upload files</a>	
Showing 8 of 8								<input type="text" value="Search"/>	<a href="#">Filters</a>
<input type="checkbox"/>	Document	Patient	Document type	Event date	Status	Filed date	Upload date ↓		
	Sample 2 (12).pdf 2 pages	Not matched	Not recorded	Not recorded	Deleted	Not recorded	02-Apr-2023 at 10:55	 Document actions View document Restore document	
	271438-nature-lands... ).jpg 1 page	Not matched	Not recorded	Not recorded	Deleted	Not recorded			
	Sample 7 - Copy (17).pdf 1 page	Not matched	Not recorded	Not recorded	Deleted	Not recorded			

You have the following options:

- **View document** - Select to view the document, please note you cannot edit the document from here, you must restore it first.
- **Restore document** - Select to restore the document to the original folder that it was deleted from. A banner displays detailing where the document is restored to:

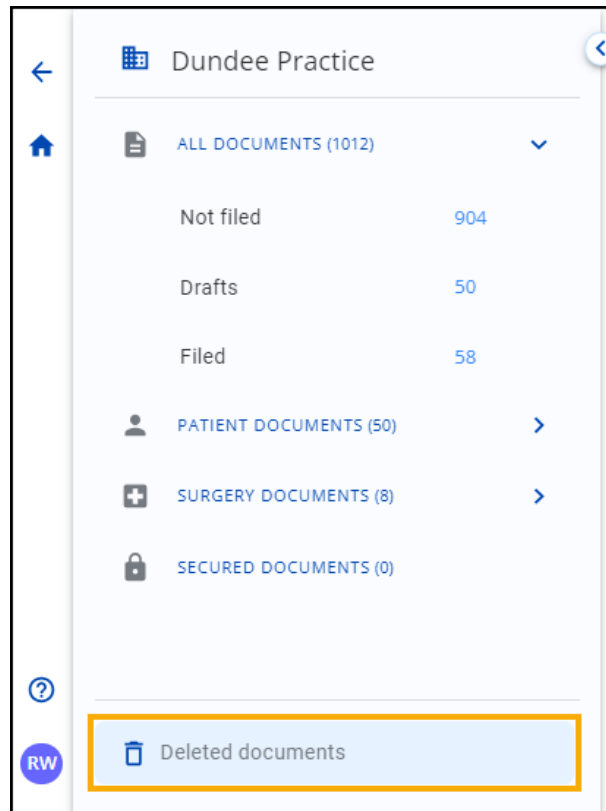


## Restoring a Deleted Document

Deleted documents are then stored in the **Deleted documents** folder for 14 days, after this time, unless they are restored, the documents are deleted from the system.

To restore a deleted document from the **Deleted documents** folder:

1. From the **Side Navigation Bar** select **Deleted documents**:







2. The **Deleted documents** screen displays:

Deleted documents								<a href="#">Upload files</a>	
Showing 8 of 8								<input type="text" value="Search"/>	<a href="#">Filters</a>
<input type="checkbox"/>	Document	Patient	Document type	Event date	Status	Filed date	Upload date ↓		
	Sample 2 (12).pdf 2 pages	Not matched	Not recorded	Not recorded	Deleted	Not recorded	02-Apr-2023 at 10:55	<a href="#">⋮</a>	
	271438-nature-lands... ).jpg 1 page	Not matched	Not recorded	Not recorded	Deleted	Not recorded	02-Apr-2023 at 10:46	<a href="#">⋮</a>	
	Sample 7 - Copy (17).pdf 1 page	Not matched	Not recorded	Not recorded	Deleted	Not recorded	02-Apr-2023 at 10:46	<a href="#">⋮</a>	

From here you have the option to:

- Search for or sort documents, see [Searching for and Sorting Documents](#) on page [59](#) for details.
- Filter the documents that display, see [Using Filters in DocHub](#) on page [57](#) for details.

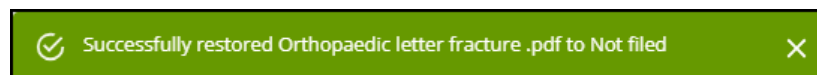
3. Select **Document actions**  at the end of a document row to view the options:

Deleted documents							<a href="#">Upload files</a>
Showing 8 of 8						<input type="text" value="Search"/>	<a href="#">Filters</a>
<input type="checkbox"/>	Document	Patient	Document type	Event date	Status	Filed date	Upload date ↓
	Sample 2 (12).pdf 2 pages	Not matched	Not recorded	Not recorded	Deleted	Not recorded	02-Apr-2023 at 10:55
	271438-nature-lands... ).jpg 1 page	Not matched	Not recorded	Not recorded	Deleted	Not recorded	
	Sample 7 - Copy (17).pdf 1 page	Not matched	Not recorded	Not recorded	Deleted	Not recorded	

- a. Select **View document** to view the document if required.

 **Note** - You cannot edit the document from here, you must restore it first.

- b. Select **Restore document** to restore the document to the original folder that it was deleted from. A banner displays detailing where the document is restored to:






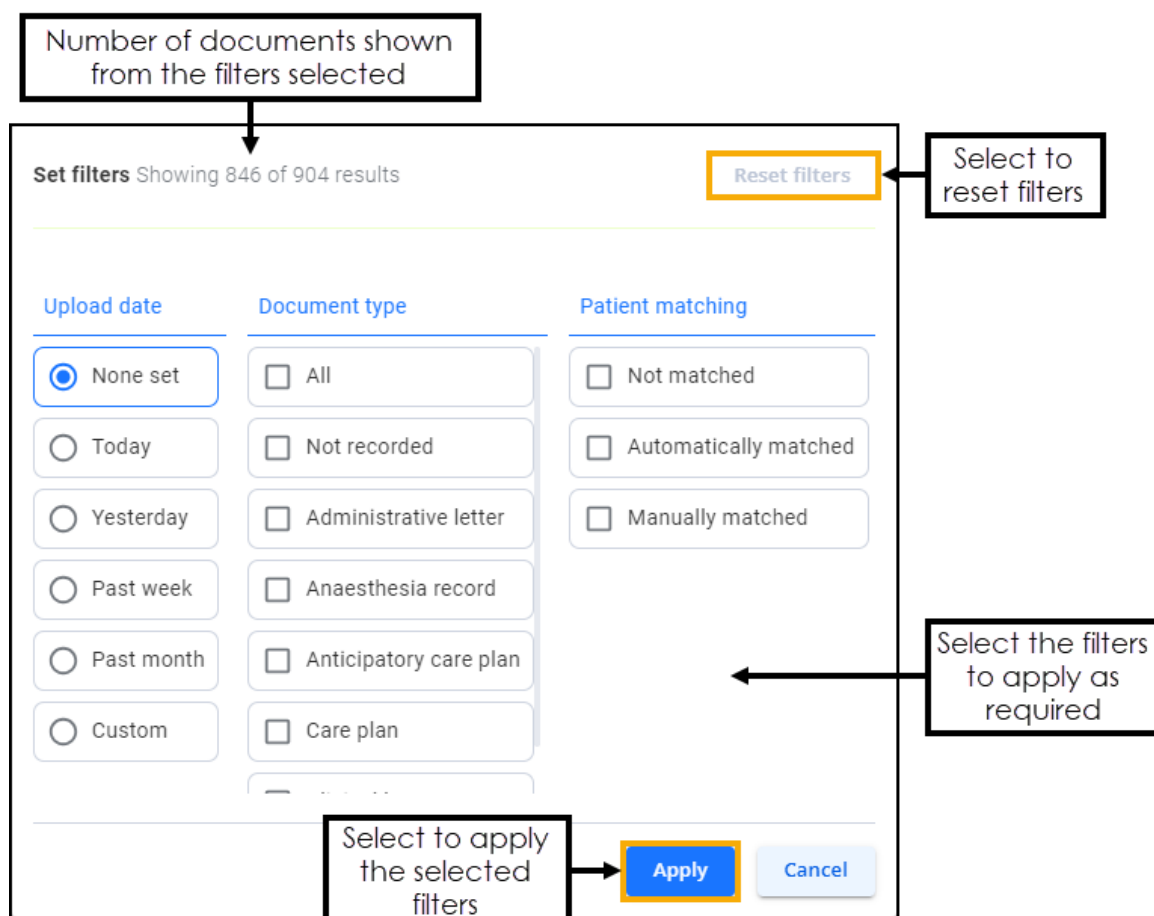
## Using Filters in DocHub

Filters can be applied to any list that displays in a folder, this can help you control the number of documents you are presented with.

➔ See also [Searching for and Sorting Documents](#) on page 59.

To filter the documents that display on your screen:

1. From **DocHub**, select the folder you want to filter, for example, **Not filed**.
2. Select **Filters**  and the **Set filters** screen displays:



Number of documents shown from the filters selected

Set filters Showing 846 of 904 results

Reset filters

Select to reset filters

Upload date

Document type

Patient matching

None set

Today

Yesterday

Past week

Past month

Custom

All

Not recorded

Administrative letter

Anaesthesia record

Anticipatory care plan

Care plan

Not matched

Automatically matched

Manually matched

Select the filters to apply as required

Select to apply the selected filters


Apply

Cancel

3. Select the filter(s) to apply, for example, you may want to only see documents that have arrived in the last week that have not been matched to a patient in which case you would select **Upload date - Past week** and **Patient matching - Not matched**. Use **Custom** to set a specific date if required.
4. Select **Apply**.



**Remember** - With filters applied, you may miss important documents, so make sure to clear them on a regular basis to check.

To clear a filter, select **Filters (n)**  - **Reset filters:**

**Set filters** Showing 0 of 904 results Reset filters

---

**Upload date**      **Document type**      **Patient matching**

<input checked="" type="radio"/> None set	<input type="checkbox"/> All	<input type="checkbox"/> Not matched
<input type="radio"/> Today	<input checked="" type="checkbox"/> Administrative letter	<input type="checkbox"/> Automatically matched

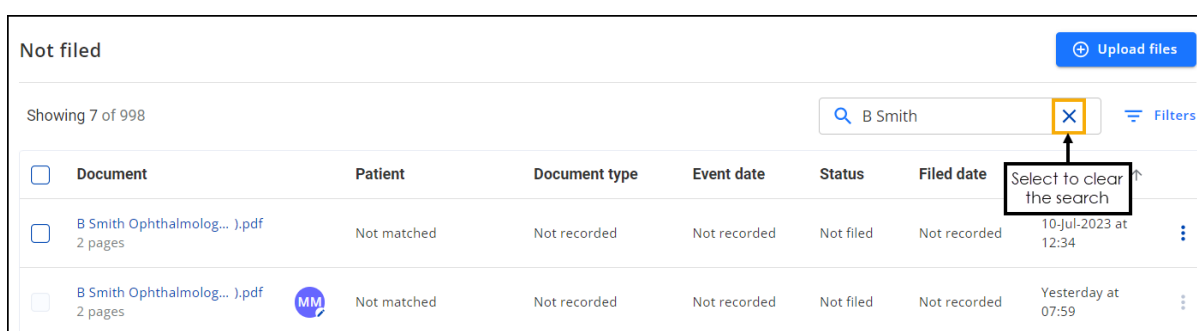
## Searching for and Sorting Documents

You can easily search for and sort for documents in **DocHub**.

 Filters can be applied to the list that displays in a folder, this can help you control the number of documents you are presented with. See [Using Filters in DocHub](#) on page 57 for details.

### Searching for Documents

To search for a document simply enter the document name in **Search**. The list update as you type:

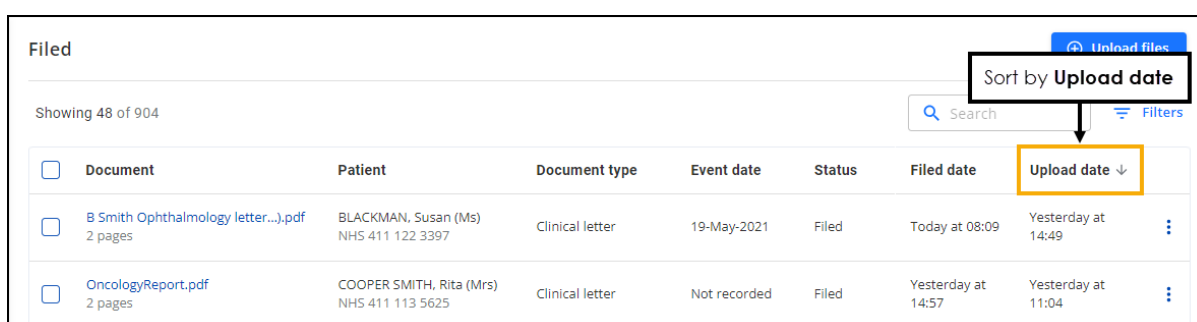


<input type="checkbox"/>	Document	Patient	Document type	Event date	Status	Filed date	
<input type="checkbox"/>	B Smith Ophthalmolog... ).pdf 2 pages	Not matched	Not recorded	Not recorded	Not filed	Not recorded	10-Jul-2023 at 12:34
<input type="checkbox"/>	B Smith Ophthalmolog... ).pdf 2 pages	Not matched	Not recorded	Not recorded	Not filed	Not recorded	Yesterday at 07:59

To clear the search, select **Close** .

### Sorting Documents

Select any header to sort the documents by the header selected, for example, select **Upload date** to sort documents by the date uploaded onto **DocHub**. You can sort ascending (oldest to newest) or descending (newest to oldest) as required:



<input type="checkbox"/>	Document	Patient	Document type	Event date	Status	Filed date	Upload date
<input type="checkbox"/>	B Smith Ophthalmology letter...).pdf 2 pages	BLACKMAN, Susan (Ms) NHS 411 122 3397	Clinical letter	19-May-2021	Filed	Today at 08:09	Yesterday at 14:49
<input type="checkbox"/>	OncologyReport.pdf 2 pages	COOPER SMITH, Rita (Mrs) NHS 411 113 5625	Clinical letter	Not recorded	Filed	Yesterday at 14:57	Yesterday at 11:04

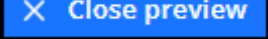
## FAQ Summary

### Document Data

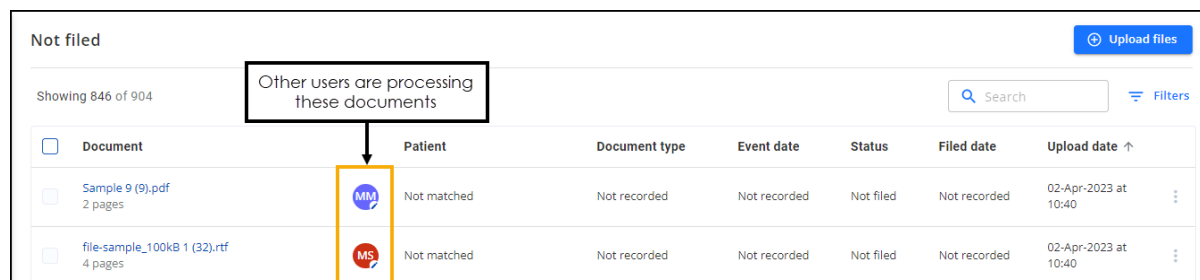
#### Why is the document data displaying as 'Not recorded'?

Another user is viewing the document:



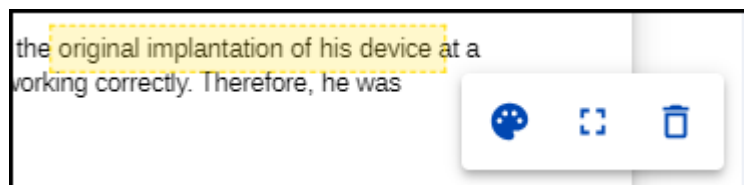
Select **Close preview**  to close the document.

Initials  in the document list indicates that another user is currently processing the document:






#### How do I change the colour or size of a highlight?

To change the colour of a highlight, select the highlight and an options toolbar displays:

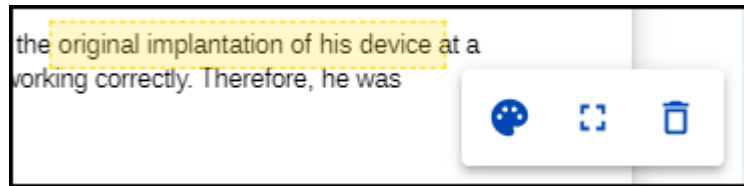


Select from:




- **Colour**  - To select a new colour
- **Resize**  - To move the highlight box
- **Delete**  - To delete the highlight

## How do I delete a highlight?

To remove a highlight, select the highlight and an option toolbar displays:





Select from:

- **Colour**  - To select a new colour
- **Resize**  - To move the highlight box
- **Delete**  - To delete the highlight

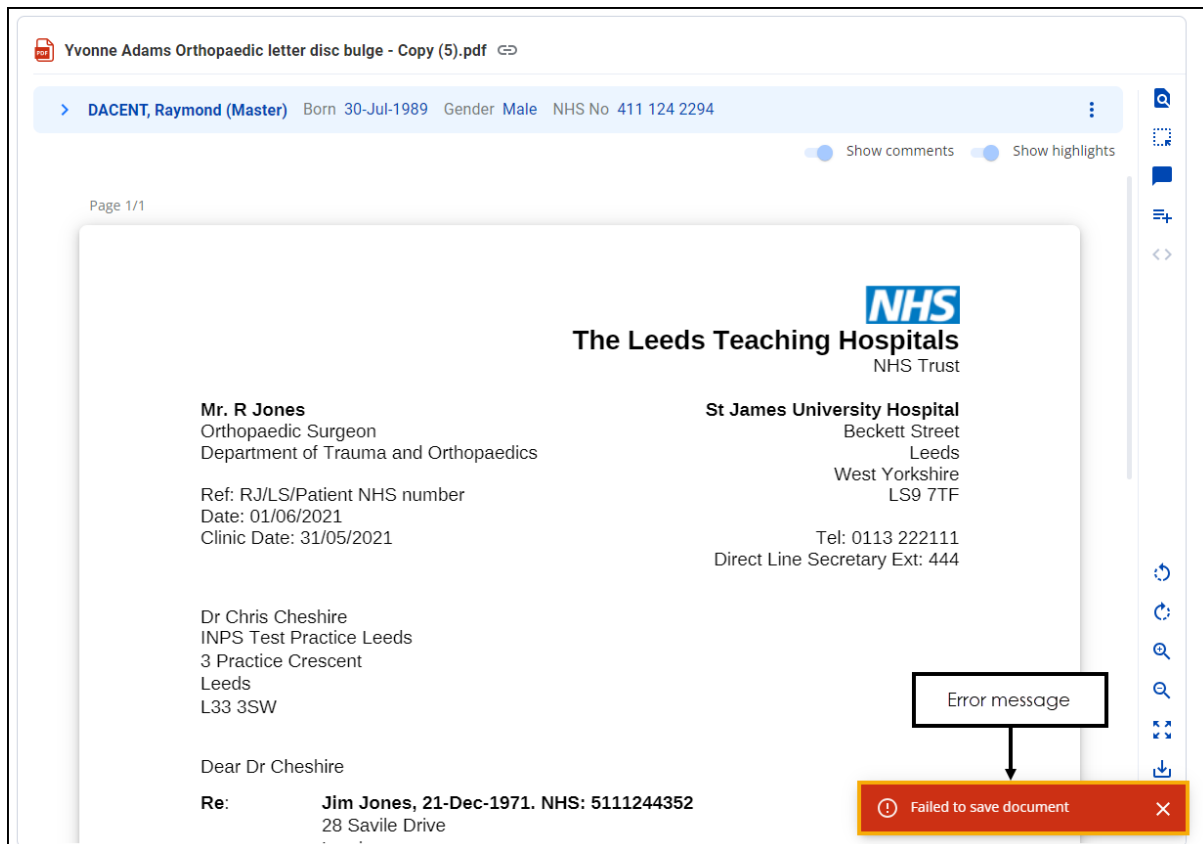
## Document Lists

### What do the icons next to the document names mean?

Icon	Description
	The document has a task allocated to it, see <a href="#">Documents with Linked Tasks</a> on page <a href="#">17</a> for details.
	The document is being viewed by another user, see <a href="#">Concurrent Users</a> on page <a href="#">16</a> for details.

## Troubleshooting

Error messages may display at the bottom of **DocHub**:



See below how to troubleshoot issues within **DocHub**:

### **Failed to save document**

There was an issue saving the document, try again.

### **Failed to attach document to selected patient**

There was an issue attaching the document to the selected patient. Try again.

### **Failed to file document**

There was an issue filing the document, try again.

## Logging Out of DocHub

As with all applications, it is important that you log out of **DocHub** properly:

To log out of **DocHub**, select your name at the bottom left of the screen and then select **Log out**:

