Introductory Comments.

This is a “Quick Start” users manual for DocHub document management. It focuses on just two important functions: 1) Sending out a document for clients to read, electronically sign and return to you and 2) Opening a copy of the completed document so that you can print a paper copy. All of the images in this brief manual come directly as screen shots from my account on the DocHub.com website. It was actually my wife, Ruth Gallagher, who handled all of the adaptation of my patient registration forms for DocHub management and who prepared this user’s manual for me, but I would be happy to be available to talk with you about any complications you have in working with DocHub.

I myself have found significant limitations in the DocHub application and cannot recommend it without reservation. I am not intimately acquainted with any of DocHub’s competitors, however, and have no particular confidence that they don’t all have their own strengths and weaknesses. Having invested considerable time adapting our documentation to the DocHub platform, we are inclined to stick with it recognizing it’s limitations.

Chief among it’s limitations is that there is no way to reliably format a document for presentation on smartphones. I was surprised by how many of my patients have neither a tablet nor a computer and expect to do all of their internet work on a smartphone. For those patients, all I can do is use the US Postal Service to mail them a patient registration packet and suggest that they return it by mail as well.

You can reach me by phone or email if you have any questions.

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How to Send a Patient Registration Packet to a Patient via DocHub

1. Log in to dochub.com – username JohnGallagherPhD@gmail.com
2. The website opens on your Dashboard page, which shows all the completed forms along with the Templates. To avoid confusion, you want to go to the Templates page. You get there by clicking on the Templates link in the list on the left of the Dashboard page, under your picture.
3. The right-side portion of the Templates page contains a list of your active templates. Find the one you want to send and click the New Copy button.

4. This will open the Create Copy dialog page. The Fill a Copy (only you) option will be set by default, but you want to change that to Send a copy as a sign request (you and/or others).
5. Clicking on **Send a copy as a sign request (you and/or others)** will open a page that allows you to type in the prospective patient’s email address. If you don’t want to change any Permissions or Options, just click the Send Request button to send the document on its way.
6. If you click the arrow on the Permissions box, you will see the values that are set by default for every document. Don’t change them unless you have a good reason.

![Permissions screenshot](image)

7. If you click the arrow on the Options box, you will see the values that are set by default for every document. If you want to change these values for the specific patient, change them here. If you want to change them for every document from every template, change them under Settings.

![Options screenshot](image)
8. To sign out of DocHub, click on your picture on the far right side of the DocHub window, and select Sign Out from the pull-down menu.
How to Print a Patient Registration Packet from Dochub

When a patient registration packet is finalized, the icon that appears with the packet in the Dochub Dashboard changes from a clock to a green checkmark.

To print a Finalized packet, click on the packet name on the Dashboard to open the document.

1. Click the **Manage and Audit** button at the top of the page.
2. On the Manage and Audit page, click the Document Actions button to open a pull-down menu.


1. A print dialog page will appear, allowing you to print the document without downloading it to your PC.
2. Review the document to make sure the insurance information is correct.
3. Place the printed document in the patient’s chart. The information will be entered into the practice management system, and the credit card information will be destroyed following the same processes used with documents that are completed by hand.