



An Electronic Method for Confirming Documentation*

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Confirming documentation, known colloquially as fact-checking, is among the most important tasks for a medical communicator. Unfortunately, this task is cumbersome and expensive when done manually. Moreover, archiving the final product—for the most part, 3-ring binders—can take up valuable storage space. An easier method is to confirm documentation electronically, which can be done with use of a computer loaded with a word processing system and Adobe Acrobat Standard or Professional (Adobe Systems Inc, San Jose, CA). The final product is a portable document format (PDF) file rather than a heavy binder.

NB: If you are confirming documentation with journal articles, books, or online content, you may be required to pay a fee to the copyright holder. Contact the Copyright Clearance Center (<http://www.copyright.com>, 1-978-750-8400) for information on how to legally archive and distribute copyrighted materials. Also, see page 106 to read about the experience of one company in securing multinational licensing agreements to share documents globally.

Preparation

Before confirming documentation, you must prepare both the manuscript and its source documents.

- Create a directory and place a copy of the manuscript file in it.
- Use the word processing program's highlight tool to mark all statements and numbers in the manuscript that need to be documented.
- Convert the manuscript to a PDF file.
- Gather all source documents that are already available as PDF files (eg, online journal articles) and place them in the same directory as the manuscript PDF file.
- Convert to all source documents in either print or other file formats to PDF (through the convert process or by scanning and then converting).

This process will take considerably less time if you routinely create and maintain an electronic repository of source documents.

Confirming Documentation

Once your source documents are collected, you can begin confirming documentation. This process involves the following:

- Search for the support for each statement or number in the source document.
The Acrobat search feature (*Ctrl-F* in PC, *Command-F* in Mac) can expedite this task if the file was converted to a PDF rather than scanned and then converted.
- Highlight each supporting statement in the document. Use either the Rectangle Tool (for images and for text in files that were scanned to PDF files; Figure 1A) or the Highlight Text Tool (for text in files converted to PDF files; Figure 1B).

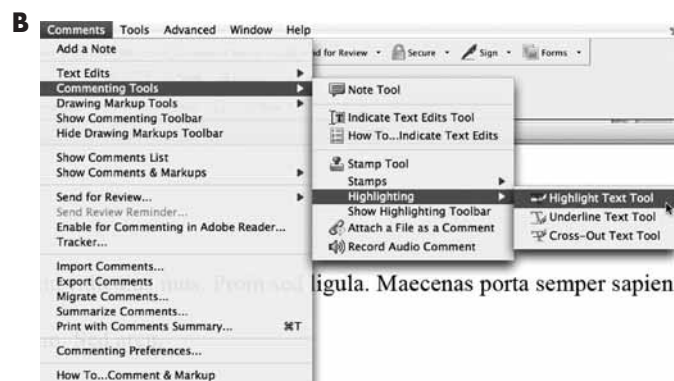
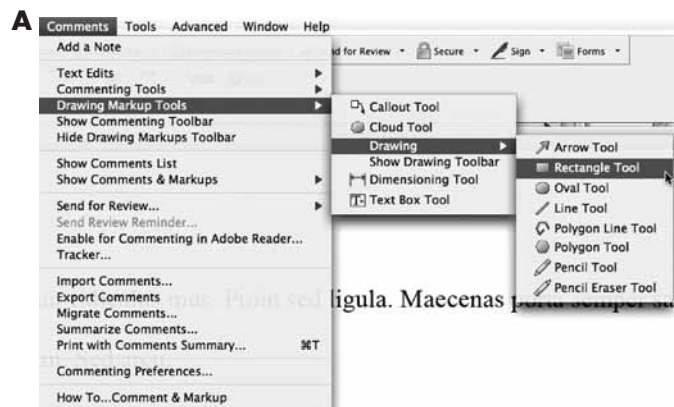


Figure 1A and 1B. Use the Rectangle Tool (1A) or the Highlight Text Tool (1B) to highlight images or text.

*Based on a poster presented at the 66th AMWA Annual Conference, October 26-28, 2006, in Albuquerque, NM.

When highlighting with the Rectangle Tool, set the fill-in opacity at 30%. This opacity level will allow the reader to view the highlighting on the printed manuscript without obscuring the text. Also, adjust the fill-in color of the Rectangle Tool so that it matches the color of the Highlight Text Tool.

- Insert the relevant PDF pages into the manuscript PDF. You can insert a page by dragging it from the navigation pane of the source PDF and dropping it into the navigation pane of the manuscript PDF (Figure 2). Supporting documentation should immediately follow each manuscript page. To reduce confusion, insert pages in order of reference on the manuscript page.
- If the process of confirming documentation raises concerns, such as errors in the manuscript, use the Note Tool to call attention to them.

Printing

Although this method allows electronic delivery and archiving, print copies may be needed for internal review. Moreover, the size of the final document may exceed limits placed on e-mail attachments by companies and Internet service providers.

When you print the final manuscript, select *Document and Comments* under the *Print What* pull-down menu at the bottom of the print dialog box to make sure that all comments, including highlighting and notes, are included. (These comments will not be included if you select *Document only*.)

If you used the Note Tool, you need to print the notes separately. The following is the process for printing notes:

- Click *Show Comments List* in the *View* menu or click the *Comments* tab at the bottom-left corner of the document display window
- Click the *Show* menu
- Click *Show by Type*
- Click *Notes* (All forms of commenting except notes will be removed from view)
- Click the *Print Comments* menu
- Click *More Options*
- Ensure that *Comments Only* and *Only the Comments Currently Showing* are selected, and click *OK*
- Click *Print Comments* menu
- Click *Print Comments Summary*
- Click *OK*

Your notes will print as a page-by-page summary.

Distributing and Archiving

Implementing this method of confirming documentation will, of course, entail a learning curve among clients, supervisors, and coworkers. Because Acrobat is so widely used, however, most computer-literate people will adapt quickly. Moreover, this method has distinct advantages compared with the manual method. The final product is a PDF file rather than a heavy binder and can be easily distributed. Telecommuters and their clients can, therefore, reduce overhead incurred by shipping and office supplies. Also, the PDF file can be archived electronically, which is more secure, cheaper, and more space-efficient than archiving large binders.

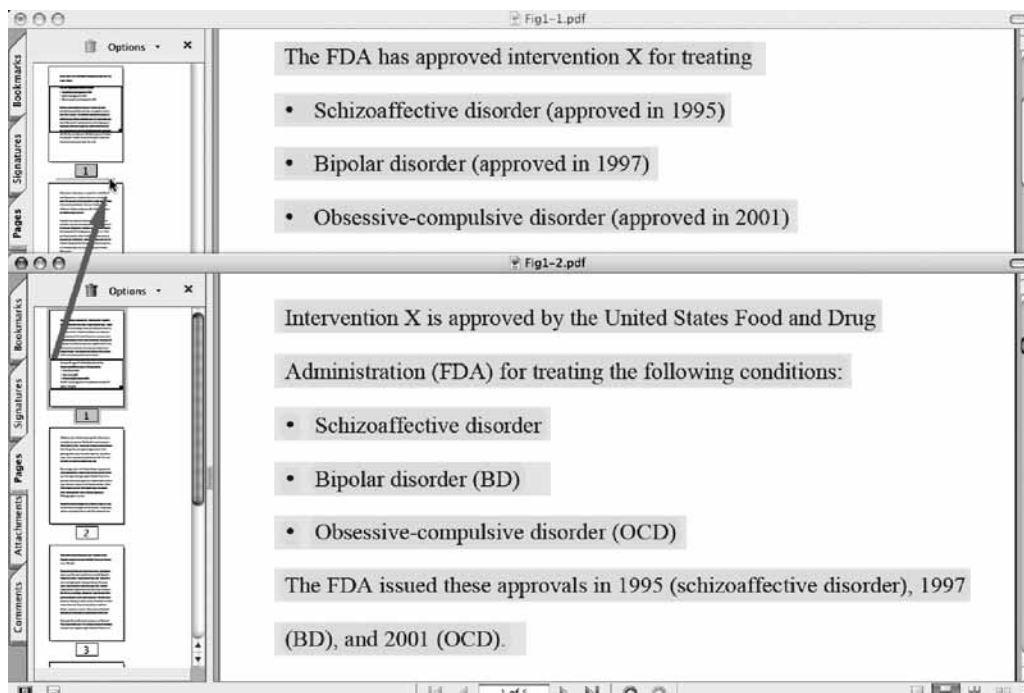


Figure 2. Insert a page into the PDF of a manuscript (top) by dragging it from the navigation pane of the source PDF file (bottom).