

**FREELANCE FOCUS**



Brian Bass



Melissa L. Bogen



Gail V. Flores



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**Q1: In the new digital age, what are some of the changes you have been making as a medical writer?**

One of the keys to freelancing success is adaptability, and nowhere is that more important than in the area of technology. My goals are to optimize my productivity and to stay at least 1 step ahead of my clients.

These are a few of my most recent advancements to keep up with or ahead of the curve:

- **Online software:** I get about 5 years out of a computer. When it's time for a new one, I have to upgrade most of my software as well. Getting used to new hardware and software at the same time is a nightmare! In 2019 I subscribed to Office 365, and last year I upgraded to Microsoft 365. I also switched to the online version of my bookkeeping software, QuickBooks. Online software upgrades continuously so the changes are incremental instead of sweeping. It also ensures I'm always working with the latest versions.
- **Cloud backup:** About 3 years ago, I switched from a local backup for my computer files to a cloud backup system. I did my research, consulted with my computer guru, and went with Carbonite. It offers 128-bit encryption, world-class security, and Health Insurance Portability and Accountability Act compliance support. It saved my life! During the summer, my computer system had a bit of a hiccup and I lost everything. Within 24 hours, I had it all back.
- **Password manager:** I'm overwhelmed with passwords. Recently I began researching password managers and questioning why I've been so hesitant to use one. The answer is fear of the unknown. Now that I have a better understanding of their security and potential benefits, I'm getting closer to switching over from my current archaic method.
- **Multiple monitors:** I've always docked my laptop to an external monitor. About 7 years ago I added a

second external monitor and immediately wondered why I waited so long! Today I use 3 external monitors and could easily justify more. Not only has it made me more efficient, but it has also saved me a ton of money on printer supplies.

— **Brian Bass**

Naturally, we all try new programs to keep up—but I try to avoid spending money unless something is truly essential for me (eg, Microsoft Word). Having worked with many new small programs that I found unhelpful and too glitchy (eg, EndNote, Grammarly), I stopped using them. I use the spellcheck and grammar check in the Word program. Because I have been a medical writer for more than 25 years now, I trust my English usage without adding yet another electronic helper. Of course, newer people with little hands-on writing experience who are trying to enter the field of medical writing likely need the grammar check programs more than those with years of experience. I do feel that new graduates, or those switching from other professions to medical writing, should *practice* writing on their own so they are more skilled at writing better and faster—this skill comes solely from practice, not from reading about it. But almost everything can be obtained online now.

Because of the annoying (to me) practice of having to subscribe to programs on a monthly basis rather than purchasing them outright and owning the program, I have stopped using certain programs—eg, QuarkXPress, Adobe Illustrator, Adobe InDesign, and Adobe Photoshop. This means that I also have stopped taking on projects that require these programs; I do not regret it, although I was once reasonably proficient with Quark and Illustrator. To me, the editing function in Adobe Acrobat is far more cumbersome and less efficient than editing in Word, so I also no longer take on projects that require *heavy editing* in that program. I prefer now to focus on medical writing, editing,

editorial review and critique, format correction, template creation, and quality assurance for regulatory documents.

Today, almost everything is now done via the Internet and social media, and we all have gradually adjusted to this. No longer is it so easy to call a client or consultant on the telephone; now it is either email or text messaging. Nonetheless, I always speak to a new client by phone before accepting a new project; it is simply more efficient. Today most pharmaceutical/contact research organization clients use shareware programs such as DropBox or GoogleDocs rather than attaching the files to an email; this change has been required for several years now. Because of poor project management on the part of too many clients, this process is frequently more cumbersome than receiving the required materials via email, but one has to *ride the horse in the direction he's going* so I accept this. Once in a while (not often), I encounter a good project manager, and materials are well organized, clearly labeled, and easy to grab.

One can obtain templates and samples of most regulatory reports in the International Council for Harmonisation of Technical Requirements for Pharmaceuticals for Human Use format online as necessary—but I have all that already from having written so many throughout my career. Likewise, today it is easy to download sample articles from a specific journal (in addition to the Instructions for Authors) to ensure using the proper formats and editorial styles.

On the whole, over the last many years, clients expect medical writers to have a strong facility with technology; often they care more about the tech aspects than the actual writing and the skill of good communication. Equally often, they do not seem to recognize the difference between clear communication/decent writing and the kind of rote things that less experienced people produce. So, I think the horse will continue galloping in this direction and all of us must adapt. If there is too much technology involved and too much unclear data provided, one may opt not to accept that particular project.

— **Cathryn D. Evans**

In the last 1-2 years, I've made changes enabling me to become increasingly less reliant on paper. To proofread my own work, I now save my Word or PowerPoint documents as Portable Document Format files (PDF), which differentiates them enough that I spot errors I wouldn't have noticed in the native files. I review the PDFs on one monitor and enter edits directly into the native files on my other monitor instead of printing the document, proofreading with a red pen, and entering edits into the native files. Not only am I saving paper, but I'm also saving time.

To reduce my use of notepads and sticky notes, I've started using OneNote (part of the Microsoft Office suite). I have various notebooks for meeting notes, invoices, and to-do lists, with tabs for different clients. I particularly like being able to take meeting notes in calendar invites imported from Outlook, so I can capture the date/time of the meeting and the attendees.

I recently started using the scheduling feature of the online time-tracking platform I've been using for years (PayMo). I can see my entire week and month at a glance, including the due dates for each deliverable for each project. It had made scheduling so much easier that I no longer need a physical planner.

Overarching these individual changes is my move to 100% cloud storage. I'm a Mac and iPhone user, and everything on my computer is backed up to my iCloud account. I didn't realize how useful this was until one day last year when my Mac completely died, late in the afternoon, when my first deliverable was due to a new client. I was able to log on to my iCloud account from another computer in the house and was up and running in the same Word file and could access the same highlighted references, bookmarked websites, and emails within 20 minutes.

As medical communicators, I believe we should continue to learn about new programs, platforms, and technologies to increase our value to clients. For those of us who don't have tech support, so many issues can be solved through a simple Google search or YouTube video, empowering us to approach our clients with solutions rather than problems.

— **Gail V. Flores**

The primary change is that I now have a cloud backup system in place. In June, I bought a new computer. I thought my external 1-TB backup drive with nightly backups would work seamlessly to transfer all my data to the new computer in case the Geek Squad had trouble with the computer's hard drive.

The day I gave my computer to the Geek Squad the external backup drive said it was full. Because of the proprietary backup software, the files could not be dragged and dropped off the drive, and I had trouble clearing space. Nevertheless, I thought I had managed to do a full backup that day.

My computer's hard drive had been working fine, but the Geek Squad said the hard drive failed during the data transfer, so they used the external backup drive to transfer data. Unfortunately, something must have gone awry with the backup and many of my Word files were missing.

Another American Medical Writers Association (AMWA) colleague suggested using a cloud back-up system. Many such systems are available. I chose Carbonite Safe Basic (<https://www.carbonite.com/>). Usually \$84/year but now on sale at about \$60/year, the service includes automatic unlimited backup and remote access from any device. The files can be accessed individually by drag and drop or restored as a group. Now I no longer worry about my backup. Another bonus: I can access my complete hard drive remotely, so I don't have to copy files to Dropbox to transfer them to my laptop.

— **Melissa L. Bogen**

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## **Q2: What software do you recommend to a new freelancer?**

Microsoft Office is of course a must for any new freelancer for creating and working in Word, PowerPoint, and Excel documents; other features such as Outlook and OneNote are optional, but I prefer using them as they work well with my other Office products (for example, my customized spellcheck and autocorrect settings are automatically incorporated across all products in the Microsoft suite). Adobe Acrobat Pro DC is critical for highlighting and annotating journal articles and other references. Finally, an accounting program is key for submitting and tracking invoices.

In addition to software housed on a computer, I recommend that new freelancers subscribe to an online time-tracking platform, a medical dictionary, and a cloud storage system, such as Dropbox. I resisted investing in such tools for years because I didn't want to spend additional funds, but once I got them I couldn't believe I ever functioned without them, as they have both increased my efficiency and let clients know that I take my work seriously and have more than paid for themselves over the years.

— **Gail V. Flores**

Go to [https://www.amwa.org/page/Partner\\_Discounts](https://www.amwa.org/page/Partner_Discounts) to find discounts for AMWA members on some of these software programs:

- *AMA Manual of Style* (20% off for AMWA members): I bought the hardcover edition with one year of the online subscription so I can look things up quickly while I'm working. The online version has automatic updates. However, the online version is not as clearly set up as the hardcopy, so I often consult my hard copy

once I know where to look.

<https://www.ammanualofstyle.com>

- Stedman's Plus 2022 Medical/Pharmaceutical Spellchecker: This software works seamlessly in Microsoft Office programs (Word, PowerPoint, etc) and contains all the latest medical and pharmaceutical terms. USD \$99.95.  
<https://shop.lww.com/Stedman-s-Plus-2022-Medical-Pharmaceutical-Spellchecker--Single-User-Download-/p/9781975183677>
- PerfectIt (30% off for AMWA members): Proofreading software for professionals. You can start a free trial for 14 days.  
<https://intelligentediting.com>
- Jack Lyon's Editor's ToolKit Plus and List Fixer, among others. You can strip footnotes to the end of a file, change automatically numbered lists to fixed numbers, and automate many repetitive tasks to free up your brain for the more substantive edits.  
<https://www.editorium.com>

— **Melissa L. Bogen**

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## **Q3: What are the pros/cons of using grammar or proofreading software such as Grammarly or PerfectIt?**

I have only used PerfectIt, which has been essential for my work as a medical editor. PerfectIt automatically runs some standard consistency checks (eg, compound adjectives before a noun, hyphen or no hyphen, common typos). When an inconsistency is found, it shows the 2 variations and the user chooses the preferred form. The program will stop at each instance to let you decide how and whether to fix the inconsistency. PerfectIt cannot replace an editor. It handles mechanical aspects of job, leaving the editor to make substantive edits.

The Table of Abbreviations that PerfectIt creates at the end is worth the price of the program. The Table that is created must be double-checked because, for example, abbreviations in square brackets are not found and it "thinks" author initials are abbreviations, but the Table easily compiles the vast majority of the abbreviations in a file that can be saved as a separate document.

Versions

- PerfectIt 5 (standalone) is the latest version
- PerfectIt Cloud (is Mac compatible)
  - Secure connection does not send data anywhere
  - Files are confidential

Tutorial: <https://intelligentediting.com/product/introduction/>

Tips for editing in PerfectIt: <https://intelligentediting.com/support/faqs/categories/tips-for-editing-with-perfectit/>

— **Melissa L. Bogen**

As a writer, I have not invested PerfectIt primarily because I use a Mac, and PerfectIt only has cloud support on Macs. Many of PerfectIt's functions are limited while using a Mac,

so I have not found it worth the investment. I would consider it if they offered a Mac version that is as good as the PC version. However, I have used Grammarly. I found it very helpful for doing grammar and language checks that Word will often miss. It is like a second set of eyes for me and is very valuable when working on the same document for too long. On Mac, Grammarly is also cloud-based and is not integrated with Word. But it seems to have all the features that the PC Word-integrated version has. Therefore, I have found it to be a good investment.

— **Ruwaida Vakil**



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