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Q What are the pros and cons of using reference management software programs to manage references? What are your preferences in terms of software?

A If you don't relish manually typing references and renumbering citations during manuscript editing, the pros of using reference management software far outweigh the cons. I started using citation management software very early in my medical writing career and I have never looked back. I was a longtime user of the defunct Reference Manager and then switched to EndNote, which is made by the same company. I also learned to use the open-source Zotero for one client who eventually switched to EndNote. I currently use EndNote X8, and I am considering upgrading to the latest version. The few times that I needed tech support, they responded quickly with information to help me resolve the issue. Another strong incentive for me to use EndNote is that it is the software used by all of my clients who use citation management software.

Here are some of the pros and cons of using reference management software:

Pros:

- Saves times by automating renumbering and reformatting of citations and reference lists
- Makes it easy to capture citations from major databases, standardize formatting of reference lists, and reformat a manuscript for submission to a different journal
- Facilitates the management and sharing of citation databases and associated PDFs

Cons:

- Cost (except for some free programs like Zotero)
- Learning curve to become proficient with the software
- Need to sometimes edit literature database entries and journal styles (to resolve issues like capitalization format, number of authors listed)
- Need to remember to remove codes before to submission to certain journals (an easy automated step)

I think that reference management software is an essential, time- and headache-saving tool for medical writers who write scientific articles and other types of manuscripts and reports containing multiple citations.

— Monica Nicosia

Reference management software platforms include EndNote, Zotero, Reference Manager, Mendeley, EasyBib.com, Cite This for Me, Sciwheel, Refworks, and cite4me.org. My preference is EndNote because I have used it for decades. I update whenever I purchase a new computer (50% discount from company). EndNote also has a very knowledgeable tech team to help resolve any issues. Because I have multiple clients, I do not use EndNote online because it may merge the EndNote files from multiple clients. However, if you are at a university, it may not be an issue.

I experience the following main advantages to using EndNote during the literature search, the main writing process, formatting, and providing deliverables:

1. Harvesting potentially relevant references during the supplemental literature search
2. Single-click retrieval of most open-access journal articles
3. Downloadable citations from PubMed and other databases
4. Searchable database with relevant references while writing
5. Time saver for formatting in-text citations and an accurate reference list during writing and subsequently after client-requested revisions
6. Relatively rapid conversion to other formats for citations in the text and reference list
7. Editable format styles so I can make client-specific styles
8. Easily transferable file (eg, EndNote) to clients in case client may have further rounds of reviews (eg, guidelines for professional societies)

The advantages of reference management software increase with the length of the document and the number of citations. Many clients prefer the use of reference management software and also prefer further details on the location of the specific information cited in the reference. Depending

on the client's preferred style, I often provide the added information (eg, page, paragraph, table, figure) in a comment bubble.

As for contraindications, when a client prefers that the in-text citation uses their in-house specific format style that contains the page and paragraph, the reference management software may consider each entry as a new reference.

In summary, I routinely use reference management software while writing documents. If needed, the EndNote metatag can be removed before sending deliverable.

— Katherine Molnar-Kimber



Is there a particular software that you would recommend to keep track of business expenses for tax purposes?



I am quite happy with FreshBooks, which I started using 5 years ago when I relaunched my freelance business. FreshBooks is easy to use, and the tech support is good. I access my secure, cloud-based FreshBooks account from a Web browser and from an app on my phone. A user-friendly interface allows me to easily enter my expenses (manually or by importing credit card or bank charges), add pictures of receipts to expenses, and generate income/expense reports for preparing taxes. Like other similar programs, FreshBooks provides the option of sharing data and reports with an accountant.

There are many types of accounting/bookkeeping software platforms and apps that can be used to keep track of business expenses. Some are available for free, usually with limited functionality. Other examples of accounting/bookkeeping software and apps include AccountEdge, Expensify, FreeAgent, Paydirt, QuickBooks, Quicken, Wave, Xero, and Zoho. I have not used them or read recent reviews about them so I can't recommend any particular one. In my unpublished 2018 *Freelance Medical Communicator Tools of the Trade Survey*, the top 4 accounting/bookkeeping software/apps used by participants were QuickBooks Online (11%), QuickBooks Desktop (8%), Quicken Home & Business (5%), and FreshBooks (2%).

I chose FreshBooks because I wanted an affordable app that integrates functions that I consider essential for my business: accounting/bookkeeping (to track payments and expenses for invoicing and tax purposes), time tracking (to easily record the time spent on various projects/tasks), and invoicing. I now also use it to generate project estimates. These integrated functions save me time and thus money.

— Monica Nicosia

Business software may be the most hotly contested tool in the freelancer's toolbox. Perhaps that's because it's one of the few pieces of software we get to choose for ourselves. Some freelancers, including myself, love the business software they use and would never switch. Some dislike the business software they use but continue using it anyway. Perhaps due to fear of the unknown? In my opinion, there are only 2 mistakes a freelancer can make when it comes to business software:

1. Using a software program not designed specifically for small businesses
2. Not using all the features of your business software

I started using software for bookkeeping very early on, when there weren't any programs designed specifically for small businesses. I used Quicken, which at the time I was using for my personal finances. When QuickBooks was introduced, my freelance business switched over to it and I never looked back.

QuickBooks is great for tracking and reporting business expenses. It remembers vendors and how I've categorized them for tax reporting purposes. That makes my accountant's job easier, which saves me money. QuickBooks tracks invoices to make sure I pay them on time, which I do simply by clicking "pay" and then "print" to print a record. I pay as many bills as possible electronically, which is easier and faster for me and better for everyone I pay. QuickBooks tracks the payments I make to freelancers on my team so I can generate a 1099 report with a single click at the end of the year.

QuickBooks also tracks my payroll-related 941 tax payments to the Electronic Federal Tax Payment System. With a click I generate a subreport of those payments itemized for Medicare, Social Security, and Tax Withholding. That also makes my accountant's job easier.

It takes less than 5 minutes to prepare the quarterly tax report for my accountant, which I email to him directly through QuickBooks. At the end of the year, it takes about 10 minutes to prepare the complete year-end report for my company's final tax filing.

— Brian Bass

My simple answer is that I've found Quicken to be easy to use, reliable, and relatively affordable. Before I elaborate on Quicken, I'll give a brief overview of situations in which QuickBooks would be my recommendation. I used QuickBooks Nonprofit for 15 years as a bookkeeper. We needed this more robust software for sending tax receipts to our donors and for tracking multiple users' activities. Consider QuickBooks (rather than a personal finance software like Quicken) if you:

- Need to write invoices and receipts (I use the time tracker Harvest for this)
- Have multiple people using the same business bank account
- Have regular employees or subcontractors

When I transitioned from nonprofit work to freelancing, the minimum payment of \$25/month seemed exorbitant. Quicken (I pay \$3/month) does the following for me:

- Automatically enters transactions from my bank accounts
- Categorizes my income and expenses
- Handles my business and personal accounts side-by-side
- Streamlines reporting for taxes
- Makes it easy to observe trends in my business and analyze development efforts (reports are very user friendly)

I started with my tax lady's worksheet when setting up my categories; each line item she requests becomes a category. This ensures that I can write off as many business expenses as possible. I also track some categories for my family, such as eating out (way down this fiscal year!).

A few more things to consider:

- Make sure the software will sync with your specific bank.
- I have not found the budgeting features very intuitive in either Quicken or QuickBooks.
- It takes me about 15 minutes per month to review the transactions uploaded in Quicken and make sure everything has been categorized properly.
- At tax time, it takes no more than 45 minutes to report everything accurately. My tax lady gives me a discount for turning in my information early. This discount more than pays for the annual price of Quicken!

— Allie Boman

CALENDAR OF MEETINGS

Please confirm with individual meeting hosts

2021
AMWA

Medical Writing & Communication Conference

OCTOBER 27-29, 2021
Coming to a device near you

Trends and Opportunities for Medical Communicators

www.amwa.org/conference

International Society of Managing and Technical Editors

October 11-14, 2021

Virtual

<https://www.ismte.org/page/Conferences>

Regulatory Affairs Professionals Society

September 12-15, 2021

Virtual

<https://www.raps.org/regulatory-convergence>

National Association of Science Writers

October 8-11, 2021

Boulder, Colorado, and Virtual

<https://www.nasw.org/events>

International Conference on Communication in Healthcare

October 17-20, 2021

Virtual

<https://achonline.org/ICCH2021>

American Public Health Association

October 24-27, 2021

Denver, Colorado, and Virtual

<https://www.apha.org/events-and-meetings/annual>

AMWA Medical Writing & Communication Conference

October 27-29, 2021

Virtual

www.amwa.org/conference

European Medical Writers Association

November 4-6, 2021

London, England, and Virtual

<https://www.emwa.org/conferences/future-conferences/>

Alliance for Continuing Education in the Health Professions

January 12-15, 2022

Aurora, Colorado

<http://www.acehp.org/p/cm/ld/fid=570>

American Association for the Advancement of Science

February 17-20, 2022

Philadelphia, Pennsylvania, and Virtual

<https://meetings.aaas.org/>

DIA Europe 2022

March 29-31, 2022

Brussels, Belgium, and Virtual

<https://www.diaglobal.org/en/flagship/dia-europe-2022>