Software registration required

You must register your Final Draft program. The unregistered program will function for **thirty (30) days**, after which time you will lose access to your data fields. Full instructions on how to register are found on page iii of this manual.

Software purchase information

Keep the following information handy as it will be needed if you call MediSoft for support. Do not send this page or a copy of this page to MediSoft for registration. This is not a registration form. It is for reference purposes only.

Fill in the information below for your reference.

Serial Number: ____

Date of Purchase: ____

Customer Number: ____

Value-Added Reseller Name: ____________________________________

Practice Name: ____

Registration Code: ____
(This number is given to you by MediSoft after registration.)

Version Number: ____
(To verify the version of your Final Draft software, select
About ... in the Help menu.)

Proof of ownership

KEEP YOUR SERIALIZED SOFTWARE, even if damaged or obsolete. It is your proof of ownership.

5222 E. Baseline Road, Suite 101
Gilbert, AZ 85234

Sales	(800) 333-4747
Support	(800) 334-4006
Corporate	(480) 892-5120
Fax	(480) 892-4804
Web site	www.medisoft.com

Final Draft

Word Processor

User Manual

February 2003
Version 8

B253

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Preface

Getting Started

Requirements

Before you begin to install Final Draft, you need to be sure your system meets the following **minimum** requirements:

Software

- Microsoft Windows 98, Windows ME, Windows NT (Version 4.0 or higher with current updates), Windows 2000, or Windows XP Operating System – faster systems are recommended for better performance

Hardware

- 400 MHz or greater IBM-compatible processor
- 128 MB RAM
- 500 MB available hard-disk space
- Mouse or compatible pointing device
- CD-ROM 2X or faster disk drive

If you are not sure whether your hardware meets the above requirements, check with your hardware supplier.

If you have any questions about the hardware requirements, call MediSoft Technical Support at (800) 334-4006.

Verify the Installation CD

Your installation CD is serialized with an fourteen-digit Serial Number on the Certificate of Authenticity. If you cannot find a Serial Number, first check with the Value-Added Reseller from whom you purchased the program. If you purchased directly from MediSoft, call your Account Executive and be sure you received the proper software. Unless you purchased an update of an earlier purchase, there is no reason why you should not have received a Certificate of Authenticity.

If you did not buy directly from MediSoft and did not get a serialized Certificate of Authenticity, you were not delivered legal software. Contact your local Value-Added Reseller for the correct software.

Installation

Check the MediSoft Knowledge Base (www.medisoft.com/kb) for the most current technical information. Close all open applications prior to installation.

1. Insert the CD in the local CD-ROM drive.
2. When the installation splash screen appears, select **Install Final Draft**. If the splash screen does not appear automatically, open the Start menu from your Task bar, then select **Run**. Type ***X*:\AUTORUN** (where *X* is your CD-ROM drive letter) and click [OK] or press Enter. Select **Install Final Draft**.
3. In the ***Welcome*** screen, click [Next].
4. Click [I Accept] at the ***End User License Agreement*** screen. If you do not accept the terms set forth, you cannot complete the install.
5. In the ***Select Destination Directory*** screen, specify the drive on which you want the program installed. The default is C:\PROGRAM FILES\MEDISOFT. Click [Next].
6. In the ***Select Components*** screen, deselect a component if you do **not** want it installed. Click [Next] to begin installation.
7. Once installation is complete, click [Finish].
8. Select **Exit** in the splash screen.

☞ If you want to integrate Final Draft with a MediSoft patient accounting program, it must be installed in the same folder as your patient accounting program.

Installing on a Network

If you plan to use Final Draft with MediSoft for Networks or MediSoft Network Professional, follow the instructions contained in your MediSoft Patient Accounting manual for installation on a network.

Starting the Program

Click the Final Draft icon on your desktop, or open the Start menu in the Task bar and move the cursor to **Programs**. A drop-down list showing all of the programs installed in your Windows Operating System is displayed. Click **MediSoft**. If Final Draft has been properly installed, it will be one of the choices under the MediSoft menu. Click the Final Draft icon or name to execute the program.

Registering the Program

F1 Look up MediSoft Registration.

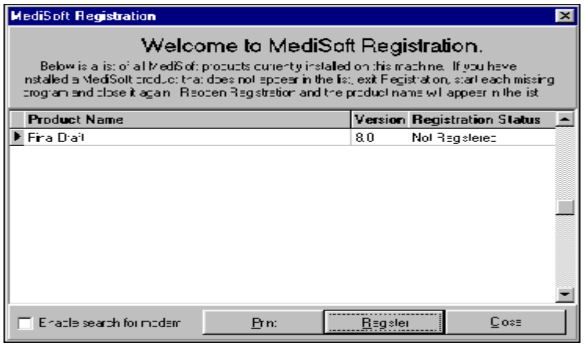
☞ This release of Final Draft requires registration, even if you have already registered a previous version of Final Draft.

You must register this program with MediSoft. The unregistered program functions for thirty (30) days from the date of installation, when it will cease to function until it is registered. We recommend that you register right away. It could take up to 14 business days to complete the registration process.

To register, go to the Help menu and select **Register Program**.

Step 1 - Enter Information

All installed MediSoft products are listed in the opening ***MediSoft Registration*** window. See Figure P.1.



Below is a list of all MediSoft products currently installed on this machine. If you have installed a MediSoft product that does not appear in the list, exit Registration, start each missing program and close it again. Reopen Registration and the product name will appear in the list.

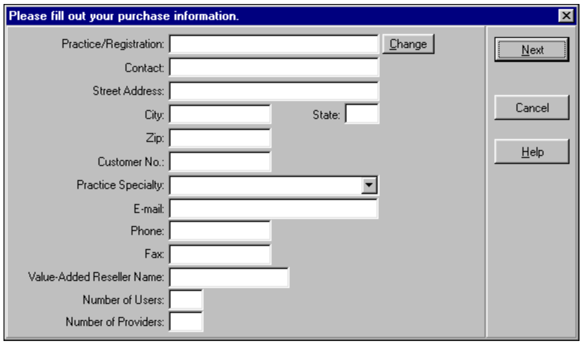
Product Name	Version	Registration Status
Final Draft	8.0	Not Registered

☐ Enable search for modem

Figure P.1

If you have a MediSoft product that is **not** listed in this window, close registration and open and close each of the products that should be listed. Then reopen ***MediSoft Registration***. Click [Register].

In the second window, fill in all information as completely as possible. This version of Final Draft requires that you register again. If you have already registered a MediSoft product (such as MediSoft Patient Accounting), information will automatically be entered here. See Figure P.2.



Please fill out your purchase information.

Practice/Registration:
Change
Next
Contact:
Street Address:
Cancel
City:
State:
Zip:
Help
Customer No.:
Practice Specialty:
E-mail:
Phone:
Fax:
Value-Added Reseller Name:
Number of Users:
Number of Providers:

Figure P.2

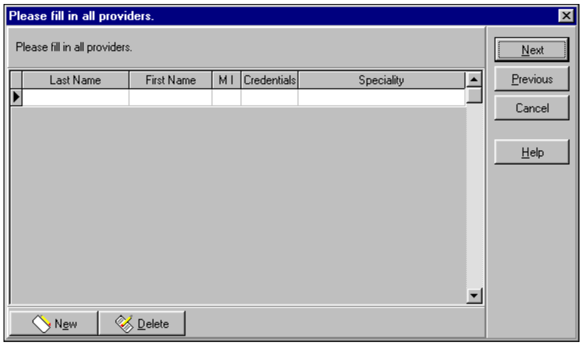
Do not change information in grayed fields unless absolutely necessary.

The practice name and address information fields may be grayed. If they are, even though there is a [Change] button, do not change this information unless absolutely necessary. Any change in these fields will **invalidate** any previous registration.

If this is your first registration, fill in all information as completely as possible. The **Practice Name** should be the same name entered in the ***Practice Information*** setup window under the File menu. The **Customer Number**, issued by MediSoft, consists of eight alphanumeric characters. If you purchased the program directly from MediSoft, the Customer Number is in the upper right corner of the invoice received with your order. If the software was purchased from a Value-Added Reseller, leave this field blank.

In the *Number of Users* field, enter the number of computers on which the program will be installed. Also, enter the number of providers in your practice. When all the information is entered and correct, click [Next].

In the next window, provide each provider's name and specialty. See Figure P.3.



Please fill in all providers.

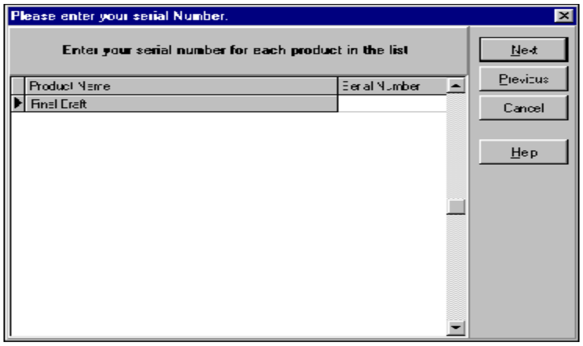
Please fill in all providers.

Last Name
First Name
M I
Credentials
Speciality
Next
Previous
Cancel
Help
New
Delete

Figure P.3

When all the information is entered and correct, click [Next].

In the next window, enter the Serial Number of each listed unregistered product. The **Serial Number** is a fourteen-digit number printed on the Certificate of Authenticity. See Figure P.4.



Please enter your serial Number.

Enter your serial number for each product in the list

Product Name	Serial Number
Final Draft	

Next
Previous
Cancel
Help

Figure P.4

Click [Next].

Step 2 - Send Registration

The program begins an immediate search for your modem. When the modem is found, the information is sent.

If a modem is not found, you have the option to print the registration information, which can then be mailed to the following address:

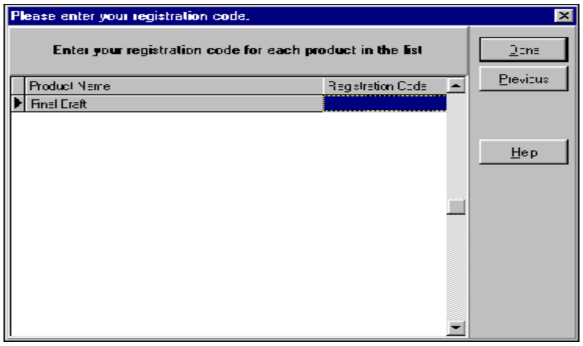
MediSoft – ATTN: Registration
5222 E. Baseline Road, Suite 101
Gilbert, AZ 85234

Step 3 - Enter Registration Code

If you registered by modem, all Registration Codes will be entered automatically in the *Registration Code* field of ***MediSoft Registration***. Click [Done] and then [Close].

If you register by mail, MediSoft will send you all necessary Registration Codes shortly after it receives your registration form.

The Registration Codes must be entered in the Registration Code page of the ***MediSoft Registration*** window. See Figure P.5.



Please enter your registration code.

Enter your registration code for each product in the list

Product Name	Registration Code
Final Draft	

Figure P.5

It is recommended that you also include your Registration Code on the first page of this manual for safekeeping. Be careful to enter the number exactly as you receive it.

How to Use the Manual

This manual is designed to give you a solid overview of what Final Draft is and how it can work for you. Specific instructions are contained in the extensive Help files within the program itself. User manuals are a great source of information. However, it takes a certain amount of time to change and reprint manuals with updated information. On the other hand, electronic updates are immediate. All current technical information is available in the MediSoft Knowledge Base at **http://ww.medisoft.com/kb**.

After a function or window is introduced in the manual, the F1 symbol tells you there is online help concerning the topic. Press F1 in the program and select the suggested topic. Example: The Setting up the Page explanation in the manual briefly explains and shows the window, then instructs, "F1 Look up Page Layout." Rather than searching through the manual for additional help, press F1 in the program, click [Search] (or press Alt + S); type "Page Layout"; and press Enter to go directly to help data specific to this procedure.

☞ If you have purchased this program as a stand-alone product, some of the features covered in the manual will not be available. To clearly identify those features that are accessible only with a program that is integrated with other MediSoft programs, the following symbol appears in the margin.

▶

Chapter Overview

The manual is set up in a Preface, six chapters, and two appendixes. Here's a quick summary of what you will find:

- **Preface**
  The **Preface** provides general information on what is needed to install and register the program, as well as instructions on using the manual.

- **Chapter 1**
  Final Draft in Windows outlines the features of a Windows Operating System and how they are applied to Final Draft. A quick look at the Menu bar and toolbar is also included.

- **Chapter 2**
  Preparing a New Document explains the options and procedures to create new documents in Final Draft, such as page setup, defining paragraphs, and setting tabs.

- **Chapter 3**
  Working With Documents covers editing pre-existing documents and using special features, such as adding graphics or importing documents.

  It also covers inserting merge fields.
- **Chapter 4**
  Letter Wizard outlines the most unique and powerful feature of Final Draft, merging data from any MediSoft patient accounting program into your Final Draft documents.
- **Chapter 5**
  Printing Documents covers what you need to know to print your documents after they have been created.
- **Chapter 6**
  Final Draft at Work reviews the information presented in the previous chapters and offers a step-by-step exercise in data entry that demonstrates the basics of the program.
- **Appendix A**
  Merging Fields offers a list of all available data fields in the MediSoft patient accounting program from which you can choose to merge data into your Final Draft documents.
- **Appendix B**
  Terminology provides a list of terms and their meanings as used in this manual and in the Final Draft and other MediSoft programs.

Documentation Conventions

As steps required to use Final Draft are explained, certain consistent instructions are given in the manual. Knowing these instructions will help you have a more clear understanding when they are used.

Buttons and Keys

Square brackets [ ] indicate a button in a window, such as [Close] or [Help]. Keys on the keyboard are indicated by pictures of the keys, such as Enter or F1 or Tab.

Entering Information

When you are instructed to enter information, type the data and then press Enter. For example, "enter the date" means to type the date and press Enter.

Title Designations

For identification purposes, all menu selection options mentioned in the manual are displayed in bold (Help menu, **Register Program**). Window names are displayed in bold and italics (***Font*** window). Titles of fields within program windows are displayed in italics (*Font Style*).

Keyboard Specifications

There are keys you will use in Final Draft that control the data. The Enter key enters typed data into the program. The Tab key lets you indent the data uniformly. You can set tab stops within the program to move you to a specified position on the page. Directional arrows let you move through the text.

Accelerator Keys

Any letter underlined on the Menu bar or in drop-down lists and some windows indicates the presence of an "accelerator key." Using the Alt key in combination with the underlined letter key selects that option or moves the cursor to that field. (Hold down the Alt key while pressing F; then release both keys. For example, Alt + F opens the File menu. The manual shows capital letters, as with the "F," but this is only to identify the key. You don't need to hold down the Shift key unless specifically instructed to do so.

There are also accelerator keys that utilize the Ctrl and/or Shift keys in combination with another key. For example, Ctrl + N creates a new document.

Function Keys

Function keys provide shortcuts to various parts of the program. The keys are usually identified by the letter "F" followed by a number from 1 to 12, such as F1. Many are assigned specific functions within the program. Some that you will encounter are: F1 (Help), F4 (Font), F5 (Select Field -

available only when Final Draft is integrated with a MediSoft patient accounting program), and F9 (Letter Wizard - available only when Final Draft is integrated with a MediSoft patient accounting program).

MediSoft Software Changes

Pending changes and updates will be reported through *MediSoft News*, a company newsletter published three or four times a year. As a MediSoft product owner, you will automatically receive these mailings.

Tips and Shortcuts on the Internet

There's a wealth of information on the MediSoft web page on the Internet. Browse through the articles in the Knowledge Base. The web site address is **www.medisoft.com/kb**.

Where to Find Help with MediSoft

Options for Support

Technical help for learning and working with MediSoft is available in four options: (1) F1 accesses the online information while within the program; (2) access the MediSoft web site; (3) local Value-Added Resellers; and (4) MediSoft telephone technical support.

- **Using Online Help**

  No matter where you are in your MediSoft program, help is just one keystroke away. If you don't understand what is wanted, or how the data should be entered, press F1, click [Help] (if available), or click the Help speed button, and data files are opened. Specific information and examples of how data should be entered will be displayed.

  In addition, you can go to the Help menu and select **Table of Contents**. Highlighting any option in the Contents list will open the related help data fields.

  Regardless of which of these entry points you utilize, the same Help files are accessed. Open the files in the manner most convenient to you and select specific topics to get the answers you need.

F1 Look up How to Use Help.

- **MediSoft Web Site**
  The Knowledge Base is a searchable online database containing technical information relevant to the use of all MediSoft products. If you are working in a MediSoft program, access is made easy by opening the Help menu and selecting MediSoft on the Web or at **http://www.medisoft.com/kb**.

  When accessed, you can search for information concerning all MediSoft products or any particular product. All current technical information is contained in the Knowledge Base. For instructions on how to use the program, click Help on the left side of the Knowledge Base page.

- **Local Value-Added Reseller**
  If you purchased your MediSoft program from a Value-Added Reseller, you can contact that Value-Added Reseller for information or answers to your questions.

- **MediSoft Technical Support**
  Call toll free (800) 334-4006. Get help when you need it with MediSoft technical support services! MediSoft support is available to answer questions and assist in troubleshooting problems.

  MediSoft support answers questions related to the operation of MediSoft software in a physician's office or a billing service. We are unable to assist with network configuration, computer hardware problems, or training on how to do medical billing. MediSoft will provide software assistance to any customer, no matter where the program was purchased.

  When You Call Support
  You'll get faster service if you have these items ready when you call MediSoft support:

  - The Serial Number and registration information for your MediSoft software.
  - Your MediSoft customer number. This is found on the upper right corner of the invoice or packing slip that came with your MediSoft program.
  - A complete description of your problem or question, including the complete text of any error messages.

- A major credit card if your free support period has expired.
- It is usually necessary for you to be able to work on your computer while you are talking to the technical support staff, so be sure your phone is close to the computer.

Service Hours
Remember, Arizona is one of those states that doesn't change to daylight saving time. Year around support is available from 6:00 AM until 5:00 PM, Monday through Friday, Mountain Standard time.

Support
MediSoft software products include a period of free telephone technical support during the product installation. In addition, this Final Draft program includes 30 days' free support after date of purchase if the product was purchased **directly** from MediSoft. If you did not purchase the program directly fromMediSoft, contact your Value-Added Reseller for applicable support policies.

When your free support period expires, you can continue to use MediSoft support services under one of our paid support plans. Several plans are available — one of which will be right for you. The semiannual support plan is the best way to get support, offering an unlimited number of 800-line support calls for a period of six months. Contact your local Value-Added Reseller, call MediSoft sales at (800) 333-4747, or visit the MediSoft web site at http://www.medisoft.com for details.

Copyrights

The Final Draft program and documentation © 1987-2003 by The Computer Place, Inc., dba MediSoft, a division of NDCHealth ("MediSoft"). All Rights Reserved.

Disclaimer

MediSoft makes no representations or warranties with respect to the contents of this manual and specifically disclaims any implied warranties and warranties of merchantability or fitness for any particular purpose. MediSoft reserves the right to make changes or alterations in this manual without the obligation to notify anyone of the changes or alterations.

All MediSoft programs maintain the integrity of the database files. However, these files are not password protected and are, therefore, accessible to compatible programs and direct manipulation. If the data is accessed by any source outside the program, all warranties will be void. The original purchaser takes full responsibility for the condition of the database files if they are corrupted by third-party programs or direct manipulation.

License Agreement

MediSoft grants to the original purchaser ("Purchaser") a nontransferable, nonexclusive license to use the accompanying software and associated documentation for the private use of Purchaser.

Acceptance and use of the software acknowledges Purchaser's agreement to abide by the terms of this License Agreement.

Permitted Uses

Purchaser may:

1. Use the software on a single computer, unless Final Draft is integrated with MediSoft for Networks or MediSoft Network Professional was purchased. If integrated with one of these products, Purchaser is authorized to install the program on all computers within one network at one location; and

2. Copy the software for backup purposes to support Purchaser's use of the software.

Prohibited Uses

Purchaser may not:

1. Distribute, rent, sublicense, or make available to others the software, documentation or any copies thereof;

2. Modify, translate, adapt, disassemble, or create derivative works from the software or documentation; or

3. Use the software or permit it to be used on more than one computer at any one time, unless using it in connection with MediSoft for Networks or MediSoft Network Professional.

The software, documentation, and all manuals accompanying the software are copyrighted and all rights are reserved by MediSoft. No copyrighted material may be copied, photocopied, reproduced, translated, or reduced to any electronic medium or machine-readable device without prior written consent from MediSoft.

Limited Warranty

MediSoft warrants to Purchaser that the software on which the original program is recorded will be free from defects in material and workmanship for a period of thirty (30) days from the date of purchase under normal conditions of use and service.

Should the installation software become defective within thirty (30) days from the date of purchase, MediSoft will replace the software or, at its option, MediSoft may refund the original purchase price.

MediSoft, its software suppliers, distributors, and Value-Added Resellers make no representations, warranties, or guarantees, express or implied, including warranties of merchantability or fitness for any use or any particular purpose, with regard to the software and documentation.

The software and documentation are licensed to Purchaser on an As Is basis. Liability of MediSoft will be strictly limited to the purchase price of the software in any case.

IN NO EVENT SHALL MEDISOFT BE LIABLE FOR ANY DIRECT, INCIDENTAL, OR CONSEQUENTIAL DAMAGES, INCLUDING, BUT NOT LIMITED TO, LOSS OF PROFITS, LOSS OF BENEFITS, OR LOSS OF DATA RESULTING FROM THE USE OF THIS SOFTW ARE AND ARISING OUT OF ANY CLAIMED OR ACTUAL BREACH OF WARRANTY.

Some states do not allow the exclusion or limitation of direct, incidental or consequential damages. If you reside in such a state, the above limitation may not apply to you.

NO OTHER REPRESENTATIONS OR WARRANTIES CONCERNING THE SOFTWARE OR ACCOMPANYING MATERIALS MAY BE GIVEN EXCEPT THOSE CONTAINED HEREIN.

Chapter 1

Final Draft in Windows

Welcome

F1 Look up User Login.

Final Draft is an easy-to-learn, easy-to-use word processing program that can be used as a stand-alone product, but its strength comes when integrated with the MediSoft patient accounting programs. When used in conjunction with the MediSoft programs, Final Draft can access patient files, letting you create letters and dunning messages for individuals or groups of patients. You can also create documents or reports containing patient information. In addition, if security has been applied to your patient accounting program, it also applies to your Final Draft program.

A Quick Look at Windows

When first entering Final Draft, the Menu bar displays only File, View, Tools, Window and Help menus. See Figure 1.1.

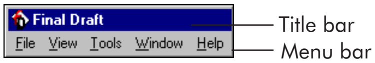

Final Draft
File View Tools Window Help
Title bar
Menu bar

Figure 1.1

As you utilize functions, the Menu bar expands to also include Edit, Insert and Format menus. See Figure 1.2.

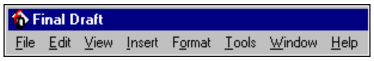

Final Draft
File Edit View Insert Format Tools Window Help

Figure 1.2

Each item on the Menu bar opens a drop-down list of added functions specific to that menu.

Below the Menu bar is the toolbar, which contains a row of speed buttons (also called icons). See Figure 1.3.

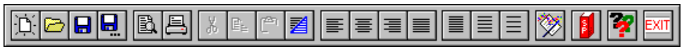


Figure 1.3

Speed buttons offer quick access to various functions usually activated elsewhere in the program. Illustrations on the speed buttons are designed to help the user make quick identification. As you move the cursor across the buttons, Hints pop up as reminders of the buttons' functions.

The Font bar offers a selection of drop-arrow windows setting up the text font and size. See Figure 1.4.

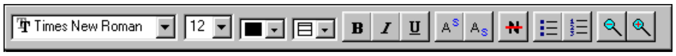


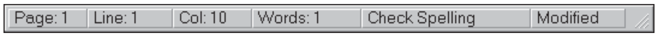
Figure 1.4

Color can be added to the type and background on the window display. Speed buttons let you change the type style to Bold, Italic, or Underlined and introduce Superscript and Subscript. The Strikeout speed button is a toggle on/off button to display text with a line through it. By clicking either of the next two buttons, the program will insert bullets or numbers to create a list, as you desire. The last two buttons change the size of the display and Zoom In or Zoom Out, respectively.

The Ruler gives you a visual measure in inches of how your data relates to the layout of the page.

The writing area is the open field in which the text is inserted. As text continues, the writing area scrolls to display the new text.

The Status bar is the space across the bottom of the program window that indicates the status of various portions of the program. See Figure 1.5.



Page: 1 | Line: 1 | Col: 10 | Words: 1 | Check Spelling | Modified

Figure 1.5

There are areas for the page number, line of text on the page, Column position, and number of words in the document. There is also an indicator that displays whether Spell Check has already been run, or if modifications have been made and Spell Check needs to be run again. The last box lets you know if the document has been modified in any way since it was opened.

A Quick Glance at the Menu Bar

F1 Look up Menu Bar Options.

- **File Menu**
  This menu gives you document choices, such as creating new, opening, closing, saving, saving as, previewing, and printing. You can set program options, import files, check document information, backup and restore, or exit the program entirely.

  You can also change the practice name, access the **Letter Wizard**, and utilize **Log in as another user** if security has been set up in your patient accounting program (all security functions are managed through your MediSoft patient accounting program).

- **Edit Menu**
  The Edit menu has the usual functions of **Cut**, **Copy**, and **Paste**, plus the option to **Undo**. **Find** and **Find Next** help you find words or phrases in your document, and **Replace** lets you replace those words or phrases. **Go to** lets you move to a specific page or line within the document. **Select All** highlights the entire document to make formatting changes.

- **View Menu**
  The View menu includes the capability to zoom in on the copy at different percentages of size. There are also toggles to **Show Tool Bar**, **Show Font Bar**, **Show Status Bar**, and/or **Show Ruler**.

- **Insert Menu**
  In this menu are several choices for adding to the working capabilities of creating a document. Here you can insert a **Page Break**, **Date or Time**, **Picture**, **Template**, or **Symbol**.

  You can also insert fields into your document to create a merge document. Fields available in the MediSoft patient accounting programs are shown in the ***Field*** window, so you can sort or search by any of them.

- **Format Menu**
  This menu contains options for font and justification. You also establish parameters for paragraphs, paragraph borders, and page layout within this menu.

- **Tools Menu**
  The Tools menu provides options to **Check Spelling** or show **System Information**. The latter option displays information about the Windows Operating System in which you are working, as well as other system information.

- **Window Menu**
  The options in the Window menu deal with the display of documents on the window. This menu also lists all documents currently open in the program.

- **Help Menu**
  The Help menu provides access to the **Table of Contents**, **How to Use Help**, **Getting Started**, and **Show Balloon Hints**. **Register Program** opens the ***MediSoft Registration*** window to register your Final Draft program with MediSoft. You can also find information about the program by selecting **About...**.

Toolbar

F1 Look up Toolbar Functions.

As you prepare to create a document in Final Draft, the speed buttons on the toolbar provide shortcuts for many procedural steps. See Figure 1.6.

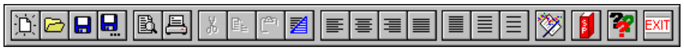


Figure 1.6

- **New**
  Clicking this speed button creates a new document.

- **Open**
  Clicking the Open speed button displays a list of documents that have already been created. At the lower right of the window are six radio buttons: *Letters*, *Documents, Narratives*, *Notes, Templates,* and *Samples*. Selecting one of the buttons displays a list of files previously entered and saved in that category. Select the document you want and click [Open] or double-click the document title to display the document.

- **Save**
  When you are finished with a document or want to save periodically (which is recommended), click the Save speed button and follow the prompts, if any, to save the document.

- **Save As**
  A new document is labeled "Untitled" until it is given a name. Click the Save As speed button early in the entry process so you can retrieve the document if anything happens to it (i.e., the computer locks up, there is a power outage, etc.).

- **Preview**
  When your document is complete and ready to print, previewing the document gives you a chance to see how it will appear before you send it to the printer.

- **Print**
  Clicking the Print speed button sends your document to the printer. Be sure the printer has been set up properly in advance.

- **Cut, Copy, Paste, and Select All**
  The next four buttons on the toolbar help you isolate and shift specific blocks of text.

F1 Look up Justification.

- **Justification**
  The next four buttons display lines representing text on a page. You can choose between left, right, center, and full justification.

- **Line Spacing**
  If you want to change the text spacing, the next three buttons let you choose between single spacing, 1.5 (or line and a half) spacing, and double spacing. For other spacing options, select Paragraph under the Format menu.

F1 Look up Letter Wizard.

- **Letter Wizard**
  The most unique feature of Final Draft, the *Letter Wizard*, is accessed by clicking the Letter Wizard speed button. This feature is a merging function and is what makes Final Draft an important part of any MediSoft patient accounting program. Merging with the MediSoft patient accounting program, you have the entire database from which to copy data into your Final Draft documents.

- **Spell Check**
  Even for the competent speller, it is good to have the security of Spell Check to run through after a letter or document is complete.

F1 Look up How to Use Help.

- **Help**
  The Help speed button is where you can find answers to most of your questions. The Help button can be clicked at any time while in Final Draft and will provide information pertinent to the section of the program in which you are working.

- **Exit**
  The Exit button closes the whole program, not just the document in which you may be working. Most of the windows in Final Draft also provide a [Cancel] button, which ends the particular operation you are performing but does not close the program.

Font Bar

F1 Look up Font Bar Options.

The Font bar deals mostly with type selections and appearance. See Figure 1.7.

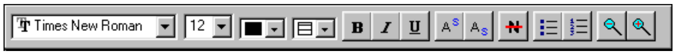


Figure 1.7

F1 Look up Font.

- **Font Select**
  The first box shows the type font that is currently in use. Click in the box or the down arrow to display a list of all the different fonts available. You can change the font by clicking the new style in the drop-down list.

- **Font Size**
  The second box displays the current type size that is currently in use. By clicking in the box or on the down arrow, you can select a different type size, from 8 to 72 (which is a full inch height). Click the size you want.

- **Font Color**
  There's a rainbow of colors in which you can display text in the window. Color highlights can help in sorting entries. This helps grouping in the procedures area or in accounting, using distinguishing colors for charges, payments, adjustments, etc. However, unless you have a color printer, your reports will print in black and white, and some colors may be printed as black.

- **Background Color**
  Accent certain activities or accounting functions with bright background colors. Clicking in the box or on the arrow displays the full array of available colors that can back up your text and highlight accent areas for you.

- **Type Styles**
  Depending upon what you want to emphasize in your text, you can use any of the next three speed buttons, or any combination of the three. **Bold** face gives added impact, and *Italic* sets the text apart. There are times when underlining can also add emphasis. Put all three together for ***extraordinary*** emphasis.

- **Superscript/Subscript**
  Another way to accent text is to reduce the size and set it off line. Both Superscript and Subscript reduce the text to about half size. Superscript prints characters at the top of the line (1^{st}), and subscript prints words or characters at the bottom of the line (1_x).

- **Strikeout**
  Showing text that is being changed or deleted is effectively done using the Strikeout feature, which puts a line through each word of the text block (such as ~~delete this~~).

- **Bullet List**
  A bullet, in text, is a black dot at the beginning of a sentence. Clicking the Bullet List speed button automatically inserts a bullet and a designated space at the beginning of each line. The bullet size varies with the size of the text.

- **Number List**
  Inserting a numbered list is easy when you click the Number List speed button. Although at first you will see no indication of a numbered list, type the first section of the list. When you press Enter, a number appears at the left margin. Each sentence is sequentially numbered. If you remove one of the numbers, the program automatically renumbers the remaining entries.

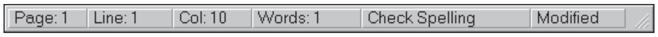
  If you have already entered a list and then decide you want the list numbered or accented with bullets, highlight the entire list and click the desired list button. Numbers or bullets will be inserted.

F1 Look up Zoom.

- **Zoom In and Out**
  The last two buttons allow you to change the display size of the Final Draft document on your monitor.

Reading the Status Bar

The Status bar across the bottom of the window displays the current account of settings on the window at the point of your cursor. See Figure 1.8.



Page: 1 | Line: 1 | Col: 10 | Words: 1 | Check Spelling | Modified

Figure 1.8

Starting at the left side of the bar are displayed the page number, then numbers indicating the line and column numbers.

The number of words in the document is displayed, as well as a reminder to run the Spell Check feature and an indicator of whether the document has been modified since its creation.

Chapter 2

Preparing a New Document

Before You Start Writing

F1 Look up Getting Started and Learning to Use Final Draft.

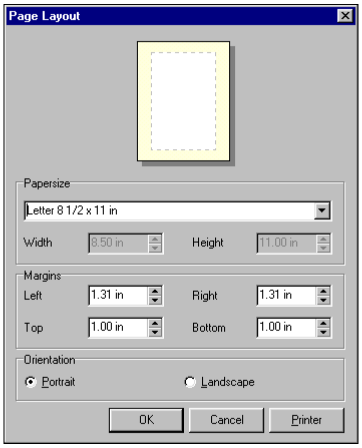
There is more to creating an effective document than just typing. Initial default decisions can be made in the ***Program Options*** window, such as the default font type, size, and color. You can also enter here the default author identification, indicate whether to show balloon hints in the program, and establish how often to perform an automatic backup save. The check list below shows other preliminary decisions to be made and where on the Menu bar to indicate those choices:

	Menu	**Option**
1. Font	Format	Font
2. Font size	Format	Font
3. Text alignment	Format	Justification
4. Paragraph spacing	Format	Paragraph
5. Document margins	Format	Page Layout
6. Paper size and orientation	Format	Page Layout

Setting up the Page

F1 Look up Page Layout.

Go to the Format menu and select **Page Layout** to open the ***Page Layout*** window. See Figure 2.1.



Papersize: Letter 8 1/2 x 11 in
Width: 8.50 in
Height: 11.00 in
Margins
Left: 1.31 in
Right: 1.31 in
Top: 1.00 in
Bottom: 1.00 in
Orientation
● Portrait
○ Landscape

Figure 2.1

The top part of the window is a page setup display that changes according to the settings marked below. The next section of the window provides *Paper Size* choices. The default is standard 8$^{1}/_{2}$” x 11" letter size, but the drop-down lists offer a variety of choices. Select the *Custom Paper Size* option and then click the *Width* or *Height* arrows to create a custom paper size. Then set the left, right, top, and bottom margins in the *Margins* section. Use the bottom section to designate the paper orientation. Portrait is vertical, a page that is higher than it is wide. Landscape paper settings are wider than they are tall. The default setting is Portrait.

Click [OK] when finished with the layout settings.

- **Setting Margins on the Ruler**
  Just above the writing area on the window is the Ruler, which not only gives you an idea of the width of the text area, but is also the base for tab markings which guide and control the indentations of text. See Figure 2.2.

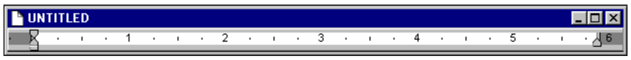


Figure 2.2

At the left end of the Ruler are two indicator arrows, one pointing up and the other pointing down, referred to as margin markers. Together they have the appearance of an hourglass and, while they work together at times, they can be separated to perform different functions.

Together they establish the left margin of the document and can be moved by dragging the lower half, or up arrow.

At the right end of the Ruler is another up arrow that controls the right margin on the page. Clicking on it, the cursor becomes a left/right directional arrow and, holding the cursor down, the margin marker can be dragged to any point desired. A visual line marks both margins within the working area.

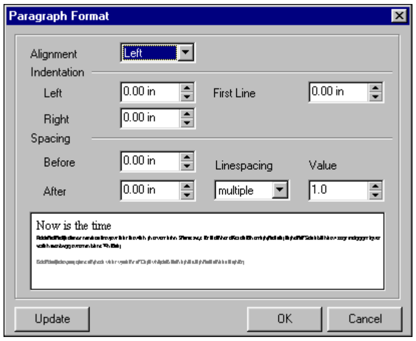
At any point in text creation, resetting the margins will affect all data entered from that point on. Then, if you need different margins at a later point in the document, simply moving the margin markers will accomplish the task.

Defining Paragraphs for Better Spacing

F1 Look up Paragraph Format.

- **Paragraphs**

  Go to the Format menu and select **Paragraph**. See Figure 2.3.



Alignment: Left
Indentation
Left: 0.00 in
First Line: 0.00 in
Right: 0.00 in
Spacing
Before: 0.00 in
After: 0.00 in
Linespacing: multiple
Value: 1.0
Now is the time

Figure 2.3

Choices made in the fields in the ***Paragraph Format*** window can greatly affect the appearance and readability of the text.

The *Alignment* drop-down box gives you a choice of *Left*, *Right*, *Centered*, or *Justified*. Alignment can also be set by going to the Format menu and selecting one of the options in the menu.

Indentation is another way to format text to make it more readable. An entire text block can be indented (from left, right, or both), or just the first line of the paragraph.

If you want only the first line of each paragraph indented, the *First Line* box lets you designate the amount of indentation. Type in the exact spacing, or click the arrows to select.

Spacing controls the amount of space between paragraphs. You can add spacing before the paragraph, after the paragraph, or both.

To apply changes without closing the ***Paragraph*** window, click [Update]. You can see the settings applied to the highlighted area in your document. If you are sure of the settings, click [OK] to apply the changes to your document and close the window.

- **Setting Paragraph Indents on the Ruler**

  To indent the first line of each paragraph, click the top half of the left margin marker, or down arrow, and drag it to the right as far as the indentation is needed or desired.

  A unique feature of the margin markers is that a single paragraph can be indented for emphasis. With the cursor anywhere within the desired paragraph, moving the margin markers will indent that entire paragraph. Both margins can be moved, on either the left or right. The rest of the text will not be affected by these indents.

- **Setting Tab Markers on the Ruler**

  By default, tabs are set at every half inch along the width of your page. Tabs for indenting copy as needed can easily be set by clicking on the Ruler at the point where you want the tab marker(s) set. Default tabs are set at every half inch. Special tabs can be placed as desired across the width of the Ruler. Special tabs override default tabs. After the last inserted special tab, the default tabs are resumed beyond the last special tab.

  In setting special tabs, the first click on the Ruler sets a marker that looks like an “L.” This is for left alignment. If you click again at the same spot, the mark becomes a reverse “L,” pointing left. This becomes a right-aligned tab. A third click on the mark creates an inverted “T,” which creates a center-aligned tab. A fourth click inserts a dot after the marker to create a decimal tab. This last type of tab creates a decimal setting for entering a column of figures, lining them up by the decimal. A fifth click removes the tab from the Ruler.

Chapter 3

Working With Documents

Creating a New Document

F1 Look up Learning to Use Final Draft.

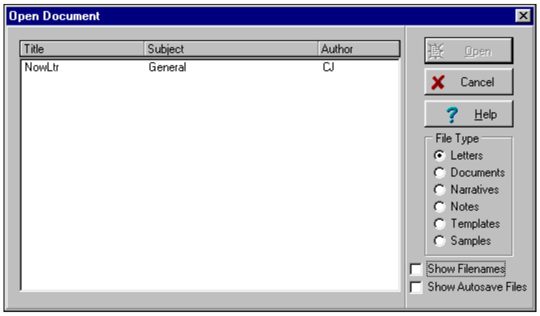
The first step in creating a document is to click the New speed button on the toolbar, or go to the File menu and select **New Document**. If you have already selected fonts, set margin alignment, and all the other functions mentioned earlier in this manual, you are ready to begin typing.

It is possible to simplify document writing by drawing from data already existing in your MediSoft patient accounting program database by merging the information with your Final Draft document. See Chapter 4.

Editing a Document

F1 Look up Open Document.

To add to or edit data in an existing document, open the ***Open Document*** window (click the Open speed button or go to the File menu and select **Open Document**). See Figure 3.1.



Title	Subject	Author
NowLtr	General	CJ

File Type
● Letters
○ Documents
○ Narratives
○ Notes
○ Templates
○ Samples

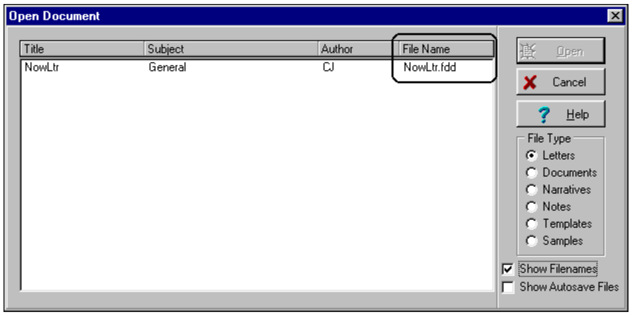
☐ Show Filenames
☐ Show Autosave Files

Figure 3.1

The ***Open Document*** window lists the documents contained in the selected *File Type* (*Letters*, *Documents*, *Narratives*, or *Notes*). At the lower right of the window are four radio buttons to indicate which type of document to display.

From the list in the data field, select the document you want to work with, then click [Open] to display the full document. You can also double-click the document title to display it in the main editing window.

To display the file names, click the *Show Filenames* check box. The window expands to display the information. See Figure 3.2.



Title	Subject	Author	File Name
NowLtr	General	CJ	NowLtr.fdd

File Type
● Letters
○ Documents
○ Narratives
○ Notes
○ Templates
○ Samples

☑ Show Filenames
☐ Show Autosave Files

Figure 3.2

To display the names of Autosaved documents, click the *Show Autosave Files* check box. These files have an extension of .fbk.

Moving, Copying, and Deleting Text

Within the Edit menu are several functions that help in handling, moving, and editing text. With a few keystrokes, you can move, copy, or delete highlighted text.

Importing Documents

F1 Look up Importing Files.

You can import .RTF and .TXT documents into Final Draft. Any document imported into Final Draft will probably need some “cleanup” work performed on it. Some format settings do not convert well from one program to another. Also, it could take some time to import a long document into Final Draft.

Replacing Text

F1 Look up Replace.

There are several ways to replace text. If you want to replace a few words only, you can highlight the words to be replaced and press Delete. You can also highlight the words to be replaced and just begin typing the new text. The portion highlighted will be replaced with the newly typed text. You can also set your cursor in the place where text needs to be edited, type the new text and then delete the incorrect text.

If you need to correct a word or phrase that appears more than once in the text, you can make the correction in one operation by using the **Replace** feature in the Edit menu.

Selecting All of a Document

⚠ This is also a quick way to delete the entire text. Don't press BkSp or Delete when all the text is highlighted unless you want it eliminated. If you accidentally delete a block of text, immediately press Ctrl + Z (Edit menu, Undo).

When the situation arises that you want to select all of the text in a document, press Ctrl + A or go to the Edit menu and select **All**. The entire text will be highlighted. This is a quick way to reset margins, change the font, or revise the paragraph definition for the entire document.

Saving and Naming Documents

F1 Look up Save Document As.

After a document has been completed, be sure to save and name it. You have the choices of **Save** or **Save As** (through the File menu or speed buttons). If you are working in an "Untitled" file (which is the default name of all new documents) and want to save what has been entered, select **Save As** and assign a name to the document. **Until a document has been saved, it is stored only in temporary memory on your computer.** It must be saved to a disk (either hard drive or floppy) to be permanently saved. Be sure to specify the document type when saving.

Adding Graphics to a Document

F1 Look up Insert Picture.

Graphics can be an effective way to add interest to a document or call attention to a message. The term "graphics" covers a wide range of art. It can include line art, cartoons, flourishes and curlicues, backgrounds, or anything else that enhances your work. The range of illustrative art available is nearly limitless.

Finding Text

F1 Look up Find.

Occasionally you might need to find a particular word or phrase in the text. The **Find** feature helps you locate quickly and easily a word or phrase in your document. Enter the word or phrase, indicate whether you want to *Match whole word only* and/or *Match case*, alter the direction in which you want the program to perform the search, then click [Find Next].

The program will search for and stop on the first usage of the given word or phrase. If that is not the place or the word you want, click [Find Next] again. There is no limit to how many times you can use that key as you move through the text.

Go To

F1 Look up Go To.

Advancing through the text to an exact page or a line on the current page is easily accomplished by using the **Go To** function. Go to the Edit menu and click **Go To** to do a search by page number or by line number.

Sample Letters and Forms

F1 Look up Letters in Your Practice Using Final Draft.

A variety of suggestions for business letters can be found in the Help files. These deal with office routine, patient interaction, personnel and personal correspondence. There are also sample letters on how to deal with your suppliers and the public and community.

Form letters that deal with legal authorizations and consent, financial forms, practice related reports, orders, plus attorney and third-party correspondence are also included.

These can be copied, with only the correct names inserted, or they can be used as a guideline that you can adapt to your needs. Check the list on letters and topics. You may get some ideas of letters that should be sent to maintain good public relations.

Chapter 4

Letter Wizard

Merging MediSoft Data into Final Draft Documents

F1 Look up Letter Wizard.

The most exciting feature in Final Draft is the ability to merge data from the patient database of your MediSoft patient accounting program into documents created in Final Draft. Virtually every field in your MediSoft database is available for insertion into a Final Draft document. You create a primary document, then, through the Letter Wizard, select the patient records and perform the merge.

Without being able to merge data from your MediSoft patient accounting program into Final Draft, you would have to input the necessary information “by hand.” MediSoft patient accounting programs and Final Draft form an alliance through the Letter Wizard for data access that can keep you at the forefront of medical healthcare communication.

Inserting Merge Fields in a Document

F1 Look up Select Data Fields.

To insert a merge field in a document, position the cursor in the document where you want a field name to appear, go to the Insert menu and select **Field** (or press F5) to open the ***Select Data Fields*** window.

Each *File* that you select in the ***Select Data Field*** window has a group of fields related to it. Choosing a different file displays a different list in the *Fields* box. See Appendix A for a complete list of available data fields available. See Figure 4.1.

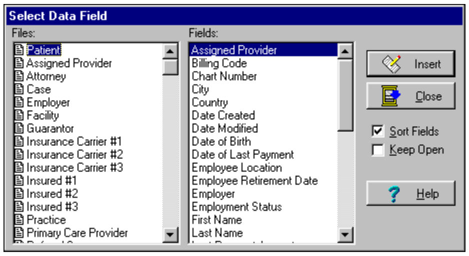

Select Data Field
Files:
Patient
Assigned Provider
Attorney
Case
Employer
Facility
Guarantor
Insurance Carrier #1
Insurance Carrier #2
Insurance Carrier #3
Insured #1
Insured #2
Insured #3
Practice
Primary Care Provider
Fields:
Assigned Provider
Billing Code
Chart Number
City
Country
Date Created
Date Modified
Date of Birth
Date of Last Payment
Employee Location
Employee Retirement Date
Employer
Employment Status
First Name
Last Name
Insert
Close
☑ Sort Fields
☐ Keep Open
Help

Figure 4.1

The *Sort Fields* check box affects the order in which the *Fields* list is displayed. The *Keep Open* check box, when clicked, keeps the ***Select Data Field*** window open so you can insert multiple merge fields into your document without having to open the window over and over.

Inserting Fields

F1 Look up Fields to Merge.

To insert merge fields into your document, first anchor your cursor where you want the field to appear; select a *File*, then select a *Field*. Clicking [Insert] places the field in your document.

#[Patient.First_Name]

☞ Do not manually type this data. Merge fields can only be inserted into your document through the ***Select Data Field*** window.

There must be at least one space between merge fields, and the program automatically inserts one space when placing the field in the document. In case of punctuation immediately after the word, move your cursor where you want the punctuation, but keep the space. To delete a merge field, you must include the entire word or phrase (include the pound sign, the brackets and all text within the brackets).

Merging Documents

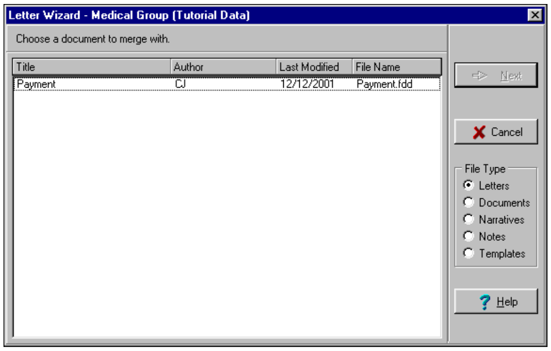
Select the Practice

If you deal with multiple practice databases, be sure you have selected the correct practice. By going to the File menu and selecting **Change Practice**, the program displays a list of practices that have been previously set up. Highlight the name of the practice desired and click [OK] or double-click the practice name to change database access.

Forms and Documents

Be sure your merge document has been created and saved.

On the toolbar is the Letter Wizard speed button, illustrated with a Wizard's wand. Click it and the ***Letter Wizard*** window is displayed. Another way to access this feature is to go to the File menu and select **Letter Wizard**. See Figure 4.2.



Letter Wizard - Medical Group (Tutorial Data)

Choose a document to merge with.

Title	Author	Last Modified	File Name
Payment	CJ	12/12/2001	Payment.fdd

File Type
- ● Letters
- ○ Documents
- ○ Narratives
- ○ Notes
- ○ Templates

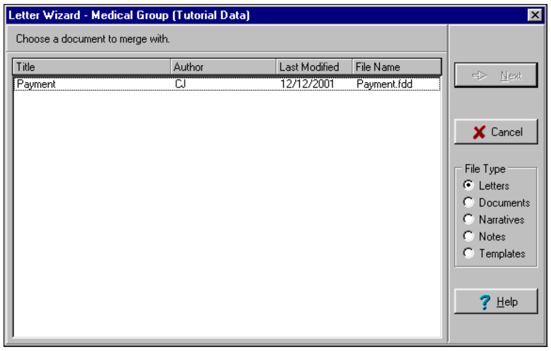
Figure 4.2

In the first window, choose the document into which you want to merge data from your patient accounting program. Click [Next].

Patient Records to Include

F1 Look up Patient Filter.

In the next window, indicate the manner in which you want the patient records displayed so you can select the records needed for the merge. See Figure 4.3.



Letter Wizard - Medical Group (Tutorial Data)

Choose a document to merge with.

Title	Author	Last Modified	File Name
Payment	CJ	12/12/2001	Payment.fdd

File Type
- ● Letters
- ○ Documents
- ○ Narratives
- ○ Notes
- ○ Templates

Figure 4.3

The options are (1) to view all patient records in Chart Number order, with the **last** case information available; (2) to view all patient records in Chart Number order, with the **first** case information available; (3) to view all patient records by case description; or (4) to select a single case of a single patient record. Click the appropriate radio button and click [Next].

If you want to narrow the number of patient records displayed in this window, click [Filter] to have only particular records displayed. All data listed in the ***Patient Filter*** window is in the Patient file. See Figure 4.4.

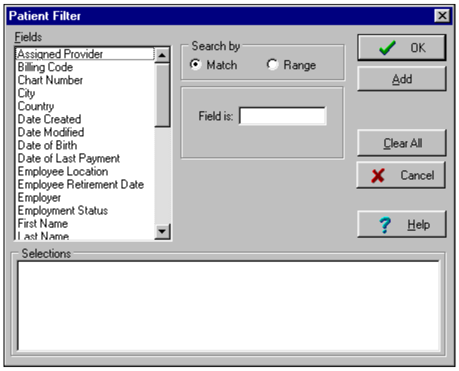

Patient Filter
Fields
Assigned Provider
Billing Code
Chart Number
City
Country
Date Created
Date Modified
Date of Birth
Date of Last Payment
Employee Location
Employee Retirement Date
Employer
Employment Status
First Name
Last Name
Search by
● Match
○ Range
Field is:
OK
Add
Clear All
Cancel
Help
Selections

Figure 4.4

Select fields and establish values here. When each selection is made, click [Add] to list that selection in the *Selections* box. Multiple filters can be applied to the database. When all filters are selected, click [OK] to apply the filters and return to select the patient records to include in your merge.

- **Selecting Individual Patient Records**
  To individually select only those records you want included in the merge, highlight each patient record in random order by holding down the Ctrl key and then highlighting each desired patient name. To include several names in a sequence, hold the Shift key and click the beginning and ending record names in the list. The program automatically highlights all names in between.

  After selecting all names to be included in the merge, click [Next].

F1 Look up Merging Errors.

- **Beginning the Merge Process**
  Clicking [Next] opens an information dialog box with the message, "Begin merging documents by clicking on Print, or Preview." Make your selection. The program will perform the merge and display or print the results.

Error Messages Clarify Merge Data

If you chose to not merge any record that is missing requested data (a check box in the third and final ***Letter Wizard*** window), performing the merge function could result in an error message. This message only informs you of which records were not merged and which data fields were missing in the record(s) not merged.

Suppose you have created a letter to send to the attorneys of all patients in your practice. The range of Chart Numbers is set to include all patients; however, not all patients have attorneys listed and some records have information missing in other requested merge fields. A message similar to the following will be displayed.

> **No records printed. Please see the Merge Errors document for more information.**

Click [OK]. A Merge Error document is automatically created and displayed in the main Final Draft window which lists identifying information to explain which records were not merged and why.

Chapter 5

Printing Documents

Preparing to Print

Spell Check and Proofread Your Document

Once a document has been generated and is ready to print, there are several things that need to be done. First, be sure the entire document has been checked for spelling errors. Then, even with the spell check, proofread the text. Sometimes words can be spelled correctly but used improperly (i.e., “It was there [their] opinion” or “He saw [was] very unhappy”).

Printer Setup

F1 Look up Print Setup.

The printer name displayed in the ***Print*** window is the printer selected for your computer. If no printer has been set up, you will have to take care of this situation before printing. Open the Start menu from the Task bar, select **Settings**, and then **Printers** (or select My Computer on your desktop, then click the Printers folder). Choose the printer you want. Return to Final Draft.

If you want to change printers, click [Setup] in the ***Print*** window. Printer setups can vary with the printer you are using. Refer to your printer user’s manual to ensure that proper parameters have been entered.

Print Preview

F1 Look up Print Preview.

Before actually going to the printer, the document can be previewed for layout and content. Whether accessed through the File menu or the speed button on the toolbar, the preview window displays the text as it appears in the document. See Figure 5.1.

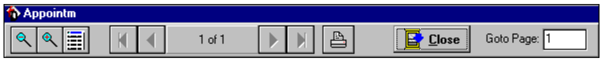


Figure 5.1

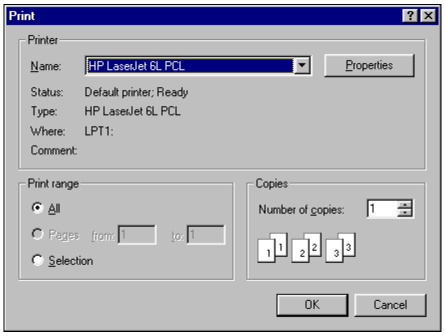
For fine tuning of spacing or getting on overview of the layout, the two zoom buttons in the upper left corner of the preview window let you zoom the text display in or out, respectively. There are also buttons to help you move through the document, or type a page number in the *Goto Page* field to move directly to that page.

You can print from the ***Preview*** window by clicking the Print speed button, or click [Close] to return to the Final Draft main editing window.

Printing

☞ If you want to go directly to print without previewing the layout, click the Print icon on the toolbar, or go to the File menu and select Print.

After you have previewed the document and clicked [Print], the ***Print*** window is displayed. See Figure 5.2.



Name: HP LaserJet 6L PCL
Status: Default printer; Ready
Type: HP LaserJet 6L PCL
Where: LPT1:
Comment:
Print range: ● All ○ Pages from: 1 to: 1 ○ Selection
Number of copies: 1

Figure 5.2

The ***Print*** window shows the default *Printer* name. The *Print range* contains radio buttons for printing *All*, *Selection* highlighted, or *Pages*, with a data entry box to specify the beginning to ending range of pages to print. Other fields are offered that affect what, how, where, and how many copies are printed.

Chapter 6

Final Draft at Work

Practice

To get a feel for using Final Draft, go to the File menu, select **New Document**, and start typing the following document text. As you follow the text, also follow the instructions given.

How to Use Final Draft

Starting to use Final Draft can be as easy as clicking the first speed button on the toolbar. Or you can begin by going to the File menu and selecting **New Document**. If you have no idea how you want the document to look, start typing. There is a default option for everything.

The default font is *Times New Roman*, usually 11 or 12 points high. It is a good, workable, easy-to-read font.

The first line of this exercise was a heading and it should look stronger and bolder than the body of the text.

Changing the font: Make changes in the font by going to the Format menu and selecting **Font**, clicking the Font speed button, or pressing F4. Any of these three actions will open the ***Font*** window, with numerous fonts displayed. If you want to change the font, the scroll bar on the side of the *Font* box lets you review all selections. When you highlight a font, the *Preview* box at the lower right of the window displays a sample of all of the options selected.

Changing the appearance of the font: Notice that, in this exercise, font names are displayed in italics. To change from regular type to italics, again access the ***Font*** window. There is a list of *Font Styles*, including regular, *italics*, **bold**, or ***bold italics***. Highlight the words in the text that should be italicized and then, in the *Font Styles* box, click *Italics*. The same thing applies to making words bold face, or choose both bold and italics for another interesting way to add emphasis.

Another way to affect the appearance of your text is to occasionally use the underline feature. This is also accessed through the ***Font*** window.

A shortcut for typing in *italics*, **bold**, or underline is to first press Ctrl + I for italics, Ctrl + B for bold, or Ctrl + U for underlining, then type the text. To display text in any combination of the above three options, use the shortcuts for each alternative you want before typing. These shortcuts are “toggle switches,” meaning the same keystrokes also turn off the features.

Create the headline

Arial is a strong, clean font that contrasts with the default body font. It is Gothic or Sans Serif, meaning it does not have the fine lines that extend from the main stroke of the letter. Return to the top of your practice document and highlight the first line of text. Press F4. In the ***Font*** window, click *Arial*, choose bold, and then indicate 12 point height and click [OK]. The headline of your text will change to appear as in this sample.

Define paragraph spacing

Looking at your entry of text, it can be difficult to tell where the paragraphs break unless you have put in an extra return between paragraphs. The text all runs together. A small extra space between paragraphs makes the text easier to read. Go to the Format menu and select **Paragraph**. The window gives you the options of indenting the first line of each paragraph and/or adding space before and/or after each paragraph. Up and Down arrows let you increase or decrease the value in increments of 10.

In this exercise, click the Up arrow twice, inserting 0.20 inches after the paragraph. It is not as large as a double space, but gives a nice open effect to make reading of the document easier.

Select body text

Now go again to the ***Font*** window and let’s look at a few other fonts for variation. Select *Symbol*, if available, and type “Let’s try this one.” Λετ σ τρψ τηισ ονε. It looks like Greek to me.

Next try *Comic Sans MS*, if available. It is cute, but not particularly “professional.”

Bookman Old Style is another “serious” font; a bit more open than *Times New Roman*, but equally professional. *Helvetica* is another clean Sans Serif font, but more open and evenly spaced. Possibly *Arial* would be a good alternative to contrast with *Times New Roman*. It is a bit more condensed. If you really want a condensed font, *Arial Narrow* will get more words into less space.

The major part of this manual is set in *Garamond*, 10 point. If it is available in your selection of fonts, select that for the body font.

Set up margin widths

The next decision pertains to paper size and margins. Again, go to the Format menu and select the bottom choice, **Page Layout**. Establish the *Paper Size* and orientation; then the *Margins*. Margin widths can make a big difference in the appearance of your document.

Another, and perhaps easier, way to set margins is by using the Ruler. The Ruler at the top of the page has margin markers at each end. To set either margin, position your cursor on the margin marker so the pointer becomes a left/right arrow and drag the marker to the right or left to change the margin. If you want to indent the first line of a paragraph, click the top half of the left margin marker and drag it to the spot desired and release the mouse button.

Moving Text

Often, when a document is reread, the sequence isn’t quite right. You can move any amount of text by placing the cursor at the beginning of the text to be moved and, clicking and holding the left mouse button down, dragging the cursor until all desired text is highlighted. Release the mouse button. Clicking the Select All speed button on the toolbar (or pressing Ctrl + A) will highlight the entire document.

Choose one of the following actions:

1. Click the Cut speed button. Move the cursor to the place where you want the selected text to appear and click the left mouse button once to anchor the cursor. Click the Paste speed button; or

2. Go to the Edit menu and select **Cut**. Move the cursor to the place where you want the selected text to appear and click the left mouse button once to anchor the cursor. Select **Paste** from the Edit menu; or

3. Press Ctrl + X to cut the selection. Move the cursor to the place where you want the selected text to appear and click the left mouse button once to anchor the cursor. Press c + V to paste the text in the new spot.

The selected material will reappear on the window where the cursor was set.

Copying Text

You can move any amount of text by placing the cursor at the beginning of the text to be moved and, clicking and holding the left mouse button down, dragging the cursor until all desired text is highlighted. Release the mouse button. Perform one of the following three options:

1. Click the Copy speed button. Move the cursor to the place where you want the selected text to appear and click the left mouse button once to anchor the cursor. Click the Paste speed button; or

2. Go to the Edit menu and select **Copy**. Move the cursor to the place where you want the selected text to appear and click the left mouse button once to anchor the cursor. Go to the Edit menu and select **Paste**; or

3. Press Ctrl + C. Move the cursor to the place where you want the selected text to appear and click the left mouse button once to anchor the cursor. Press Ctrl + V.

The selected material will reappear on the window where the cursor was set.

Deleting Text

Highlight text as instructed above under Moving Text or Copying Text, then choose one of the following options:

1. Press BkSp; or
2. Press Delete; or
3. Go to the Edit menu and select **Delete**.

Replacing Text

Select one of the following methods:

1. Highlight desired text and delete as instructed above, and type in new text; or
2. Highlight desired text and type in new text. The highlighted text will be replaced with whatever is entered; or
3. Place cursor at beginning of text to be revised, press Insert and type new text.

☞ Be sure to press Insert a second time to cancel the overwriting function, or text could be overwritten inadvertently.

Checking Spelling

When you are finished editing the document, but before printing out the finished text, check the spelling. Even if you are a good speller, there are times in typing when fingers get crossed and the wrong letters come out. Go to the Tools menu and select **Check Spelling**. With minimal input, the program will check through the text for any words not included in its dictionary.

Words Not Found: When a word is encountered in the document that does not appear in the program dictionary, the phrase Not

Found is displayed, followed by the word, *Replace with*, and the program will offer one or more *Suggestions* as possible replacements. If the suggested list provides the correct word, highlight that word and then click [Replace]. If the suggested list does not provide the correct word, you can click [Suggest] for more word replacement suggestions, or simply retype the correct word in the *Replace with* box and click [Replace].

If the questioned word is correctly spelled, you have three options: [Add] the word to the dictionary, [Skip once] over the word, or [Skip always] during that particular spell check procedure.

If the ***Spell Checker*** dialog box covers the portion of text containing the word of questionable spelling, place the mouse pointer anywhere within the colored part of the Title bar of the ***Spell Checker*** box (avoiding the Minimize, Maximize, Close, and Program menu buttons) and drag the box to another location on the window to enable you to see the questioned word in context.

This concludes the quick exercise in learning Final Draft. It is easy to get into the program and become operational. A bit of practice will make you more proficient and also give you the confidence to venture into some of the options that provide more diversity in the use of the program.

Have fun!

Appendix A

Merging Fields

Available MediSoft Merging Fields

F1 Look up Letter Wizard.

Letter Wizard merges data from MediSoft programs into Final Draft documents. A full range of files and fields is available to incorporate into any document being generated. This is done by inserting field names through the ***Select Data Field*** window. Go to the Insert menu and select **Field**; or press F5. When a document is assigned to a particular patient or group of patients, the specified field data is inserted as indicated. See Figure A.1.

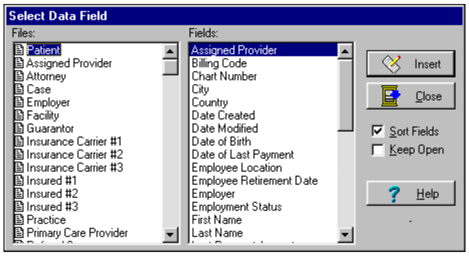

Select Data Field
Files:
Patient
Assigned Provider
Attorney
Case
Employer
Facility
Guarantor
Insurance Carrier #1
Insurance Carrier #2
Insurance Carrier #3
Insured #1
Insured #2
Insured #3
Practice
Primary Care Provider
Fields:
Assigned Provider
Billing Code
Chart Number
City
Country
Date Created
Date Modified
Date of Birth
Date of Last Payment
Employee Location
Employee Retirement Date
Employer
Employment Status
First Name
Last Name
Insert
Close
☑ Sort Fields
☐ Keep Open
Help

Figure A.1

Selecting one of the *Files* in the ***Select Data Field*** window opens a different set of *Fields* in the second data box. The *Sort Fields* check box affects the order in which the field names are displayed. Keep the window open after entering a field in your document by clicking the *Keep Open* box.

F1 Look up Fields to Merge.

Files and *Fields* included in this merge capability include the following. File names are presented in bold print, followed by the Field titles. Be aware that additional *Fields* may be available depending upon the specialty of your practice.

Patient, Guarantor, Insured 1-3

Assigned Provider
Chart Number
City
Country
Date Created
Date of Birth
Date of Last Payment
Default Modifiers 1-4
Employee Location
Employee Retirement Date
Employer
Employment Status
First Name
Last Name
Last Payment Amount
Middle Initial
Patient ID #2
Patient Reference Balance
Patient Type
Phone 1 and 2
Sex
Signature on File
Social Security No.
SOF Date
State
Street 1 and 2
Work Extension
Work Phone
Zip Code

Case

Accept Assignment #1 - #3
Accident State
Assigned Provider
Attorney
Authorized No. of Visits
Billing Code
Case Close
Case Number
Cash Case
Champus Branch of Service *
Champus Card Start Date *
Champus Nonavailability *
Champus Special Program *
Champus Sponsor Grade *
Champus Sponsor Status *
Champus Termination Date *
Chart Number
Co-payment Amount
Date Created
Date First Consulted
Date Last Seen PCP
Date of Injury/Illness

---

* **What was formerly CHAMPUS is now referred to as Tricare in the documentation, although the CHAMPUS designation remains in the file names.**

Case (cont’d.)

Date Part Disability From
Date Part Disability To
Date Similar Symptoms
Date Tot Disability From
Date Tot Disability To
Date Unable to Work From
Date Unable to Work To
Death Indicator
Description
Diagnosis 1-4
EMC Notes
Emergency
Employee Location
Employee Retirement Date
Employer
Employment Status
EPSDT
Extra 1-4
Facility
Family Planning
Group Number #1 - #3
Guarantor
Hospital Date From
Hospital Date To
Illness Indicator
Indicator 1
Insurance Carrier #1 - #3
Insured #1 - #3
Insured Relationship #1 - #3
Lab Charges
Last Visit Date
Last X-ray Date
Level of Subluxation
Local Use A - B
Marital Status
Medicaid Original Ref No.
Medicaid Resubmission No.
Nature of Accident
Notes
Other Arrangements
Outside Lab Work
Percent Covered A - H, #1 - #3
Policy #1 End Date
Policy #1 Start Date
Policy #2 Crossover Claims
Policy #2 End Date
Policy #2 Start Date
Policy #3 End Date
Policy #3 Start Date
Policy is Capitated
Policy #1 - #3
Price Code
Primary Care Provider
Print Patient Statements
Prior Authorization No.
Referral Source
Referring Provider
Related to Accident
Related to Employment
Return to Work Indicator
Same or Similar Symptoms
Student Status
Treatment Auth Through
Visit Authorization No.
Visit Series Counter
Visit Series ID
Work Phone
Work Extension
Workers Percent Disabled

Attorney, Employer, Facility, Primary Care Provider, Referral Source

City
Code
Contact
Extension
Extra 1 and 2
Fax
ID
Name
Phone
State
Street 1 and 2
Type
Zip Code

Assigned Provider, Provider, Referring Provider

BC/BS Group ID
Blue Cross/Shield PIN
Champus PIN *
City
Code
Commercial PIN
Credentials
EMC ID
Extra 1 and 2
Fax
Federal Tax ID Indicator
First Name
Group PIN
HMO PIN
Last Name
License Number
Medicaid Group ID
Medicaid PIN
Medicare Group ID
Medicare Particp Provider
Medicare PIN
Middle Initial
Other Group ID
Phone
PPO PIN
SB Number
Security Level
Signature on File
SOF Date
Specialty
SSN or Fed Tax ID
State
Street 1 and 2
UPIN
Zip Code

*** What was formerly CHAMPUS is now referred to as Tricare in the documentation, although the CHAMPUS designation remains in the file names.**

Insurance Carrier #1 - #3

City
Code
Contact
Default Billing Method
Default Payment Code
Default Write Off Code
Delay Secondary Billing
Diagnosis Code Set
EMC Extra 1 and 2
EMC Payor Number
EMC Receiver
EMC Sub ID
ETS Record Code
Extension
Fax
Indicator
Name
Phone
Plan Name
Practice ID Number
Print PINs on Ins Form
Procedure Code Set
Signature on File
State
Street 1 and 2
Type
Zip Code

Practice

City
Extension
Extra 1 and 2
Fax
Federal Tax ID
Phone
Practice Name
Practice Type
State
Street 1 and 2
Zip Code

Appendix B

Terminology

Understanding the Terminology

Many of the words in this list may be familiar, but a common understanding of their meanings is useful.

Abort – To discontinue or stop the current function or process.

Accelerator key – A shortcut combination of keys on the keyboard that can be pressed to perform a specific action, usually Alt with another key, but can also be a combination of the Ctrl and/or Shift keys with another key. An underlined letter on menu items and field labels indicates an accelerator key. Function keys are also considered accelerator keys.

Activate – To bring an application or document window to the foreground. When working in more than one application or more than one document with the active program, the active window is the window in which you are working.

Alphanumeric – Consisting of letters and/or numbers and/or other characters (such as a question mark).

Application menu – The main menu of the program, displayed in a horizontal format. Sometimes called operations menu or the Menu bar.

Backup – Act of saving some or all of the data on a backup disk.

Bit map – Representation of an image by an array of bits. *See also* Pixel.

Case – A grouping of claims usually with at least one thing in common, i.e., the same carrier, the same diagnosis, etc.

Check box – A square box with associated text that represents a choice. When a choice is made, a check mark appears in the box.

Choose – To execute and complete a command. Some commands are executed when you select the menu command; others when you click [OK]–in a window or dialog box.

Click – To place the mouse pointer at the desired location and then quickly press and release the left mouse button once.

Close button – The [X] button in the top right-hand corner of an active program which, when clicked, ends the program or closes the active window. See also Exit.

[**Close**] – The button in many windows that will close the active window but not the program.

Combobox control – A combination edit control and list box control with a down arrow button control. The button control displays a drop-down list so a selection can be made.

Control – A component of the user interface that allows you to select choices or types of information, e.g., check box, entry field, radio button, etc.

Cursor – A movable object (such as the flashing underline or block) on the computer window that indicates the position where keyboard input will appear.

Date Format (**MMDDYY or MMDDCCYY** [for Medicare forms only]) – The format used to enter dates in MediSoft programs. Enter the date without punctuation, using two digits each for month, day and year (or month, day, century and year for Medicare insurance forms).

Default – A preset value in a field.

Dialog box – A movable window containing controls that you use to provide information required to process a program request.

Drop-down menu – A menu that opens in a downward direction from a point or line at or near the top of the window. The menus on the Menu bar are all drop-down menus.

Edit control – The most common type of control for entering text.

Exit – An action that ends the program and closes all windows associated with it. Usually click the [X] Close button on the Title bar. Many data windows also have [Exit], [Cancel], or [Close] buttons. *See* Close button.

Field – The space allowed on the window for displaying or entering data, usually labeled by a field name, e.g., "Code Name."

Filter – A procedure that reads input from the keyboard, modifies the data, and displays it on the window, i.e., you set limits through the keyboard, the program searches the database for data that fits those limits and displays the result on the window.

Focus – The control or area of a window where user interaction is possible, where the data entry or action can occur or is occurring at a set point in time. A button that has the focus usually has a broken line box on the button. An edit control indicates that it has the focus by the blinking caret (vertical cursor).

Folder – A container in which documents, program files, and other files are stored in the computer or on disk. Formerly referred to as a directory.

Format code – A character assigned to a data entry field that can be used in designing a report.

Function keys – Keys usually identified by the letter "F" followed by a number from 1 to 12 which provide shortcuts to accessing various parts of the program. Each key can have assigned functions in different software.

Graying – A visual cue that a choice is not available at that time; a menu item or control is displayed in a gray color instead of black.

Highlight – Contrasting color or reverse video (light letters on dark background) indicating selection of a menu option or field in a window.

Hint – Brief summary of function displayed in a small yellow balloon when the mouse cursor is placed on a speed button in the toolbar or on a field in a window. Also known as a *ToolTip*.

Hotspot – A point of reference in a Help window that provides additional information concerning the picture, word, or group of words on which the cursor is resting. To signify that a hotspot is present, the cursor becomes the shape of a hand. Click anywhere you see a hand. Text that is linked to a hotspot is displayed in green.

Icon – *See* Speed button.

Justify – To align text to a specified position, i.e., at left or right margin, both left and right margins, or centered between the left and right margins.

Letter Wizard – The function in Final Draft that merges data from MediSoft programs into documents being created in Final Draft.

Line spacing – The distance between two consecutive typing lines.

List box – A control that presents its data in a list format from which you can make a choice. There is usually a vertical roll bar on the right side of the list. Also known as a *scroll box*.

List window – A window unique to MediSoft programs which presents each record of the given data file in a list format. This window is also called the *browser window*, indicating that the data can easily be viewed and browsed through.

Maximize – To expand the active window to fill the entire monitor screen. The Maximize button is the middle of the three buttons in the upper right corner of the Title bar. Can also reduce the display to roughly half the window.

Merge data – Data which is or can be merged from any MediSoft program and included in a Final Draft document.

Minimize – To reduce the program to a button on the Task bar. The Minimize button is the first of three buttons in the upper right corner of the Title bar.

Operation – A function in the program which can be selected from a menu.

Operations menu – The main list of options in a program. Also referred to as the *Application menu* or *Menu bar*.

Pixel – Short for "picture element." The smallest graphic unit that can be displayed on the monitor screen or in a window. All the images displayed on the computer monitor are composed of pixels. *See also* Bit map.

Radio button – A circle with text beside it (also referred to as an *option button*). Radio buttons are combined to show a fixed set of choices from which only one choice at a time can be selected. The circle is partially filled when selected.

Right-click – To position the mouse pointer in the desired location and then click the right mouse button. This action often displays a Speed menu.

Select – To highlight or mark a section of text, menu name, command, dialog box option or graphical object with keyboard or mouse actions.

Shortcut – A quicker, more direct method of doing something than the ordinary procedure; usually keystrokes as opposed to using the mouse.

Speed button – An image or picture displayed on a window on which you can click to begin a particular function or software application. Also known as an *Icon*.

Speed menu – The menu that displays when the right mouse button is pressed. This menu normally duplicates functions that can be initiated in other ways. It provides a quick and easy alternate way to execute certain commands.

Status bar – The gray bar across the bottom of an application window which displays data and information pertaining to the field or documents in which the user is working.

Submenu – A menu related to and reached from a main menu; a list of options within the application or operations menu.

Suboption – An option on a submenu.

System menu – A drop-down list that displays when the System Menu icon is selected (the upper left square in a window). Usually contains items such as Restore, Move, Minimize, Maximize, Close, and Switch To.

Task bar – The bar at the bottom of the monitor screen that contains the [Start] button, as well as minimized buttons of any active program.

Title bar – The area at the top of each window which contains the window title and System menu icon. When appropriate, it also contains the Minimize, Maximize, and/or Close buttons.

Toggle – To switch between two options, such as showing hints or not showing hints.

Toolbar – The bar just below the Menu bar that usually contains speed buttons to perform specific functions in the program. *See* Speed button.

Validation – A process used to detect input data in order to determine whether it is inaccurate, incomplete or reasonable. The object (or set of functions) that actually performs the validation of the data is called the *validator*.

Window – An area on the computer window surrounded by a box which contains information for temporary use. Windows can be used to display information or to enter data. They can include search information, help text, notes, etc.

Windows Operating System – A graphical user interface developed by Microsoft Corporation in which action can be controlled by movement with a mouse.

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