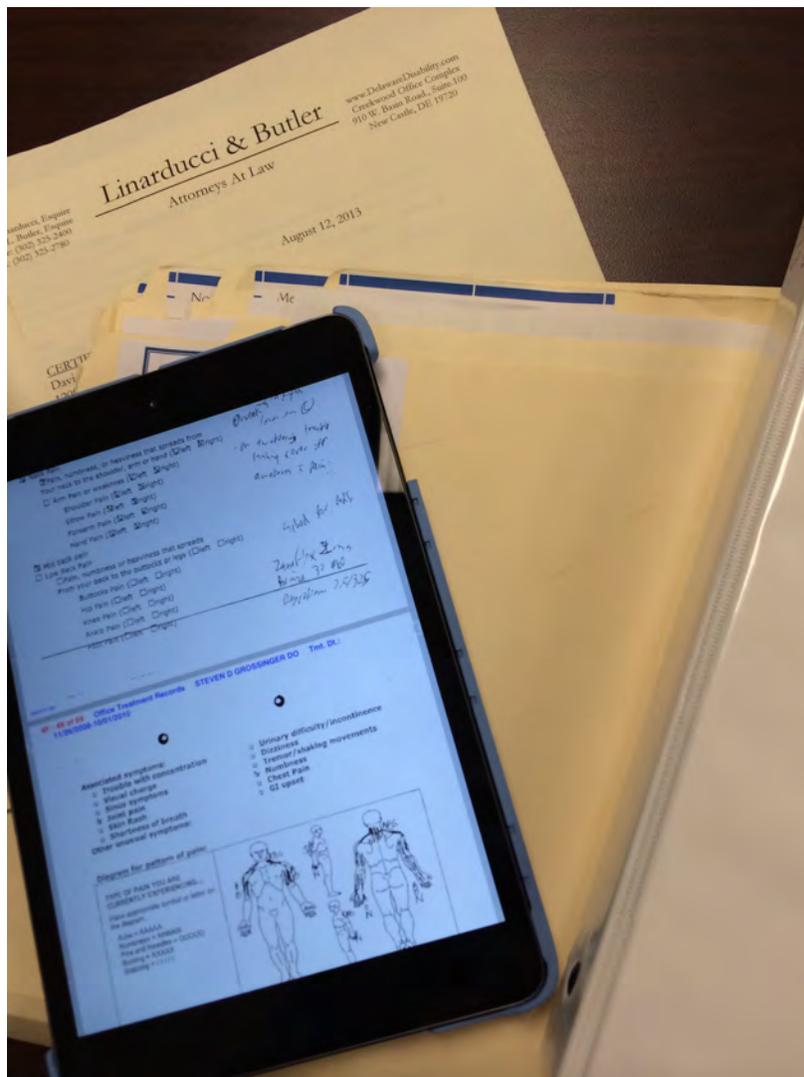


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# Using the iPad for Medical File Review

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Steven L. Butler - December 17, 2013



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## Introduction

The iPad is a powerful tool that can be used in your law office for reviewing, annotating, editing and presenting medical records. With the right apps, it is easy to transfer files to your mobile device and manipulate them for your purposes. The purpose of today's presentation is to provide you with an overview of the basic skills needed to use the iPad for simple file review.

### Transferring Files to your iPad

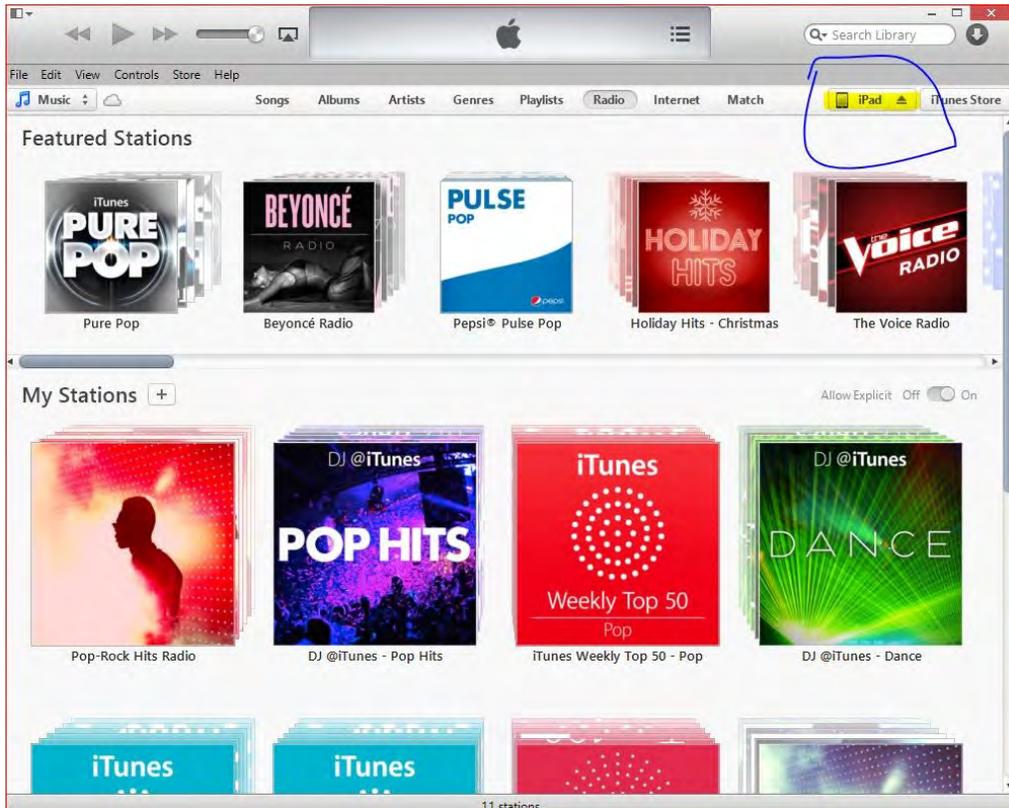


Before you can use the iPad for working with client files, you have to actually transfer the files to the device. There are several methods for doing this, but today, I will focus on the three most common.

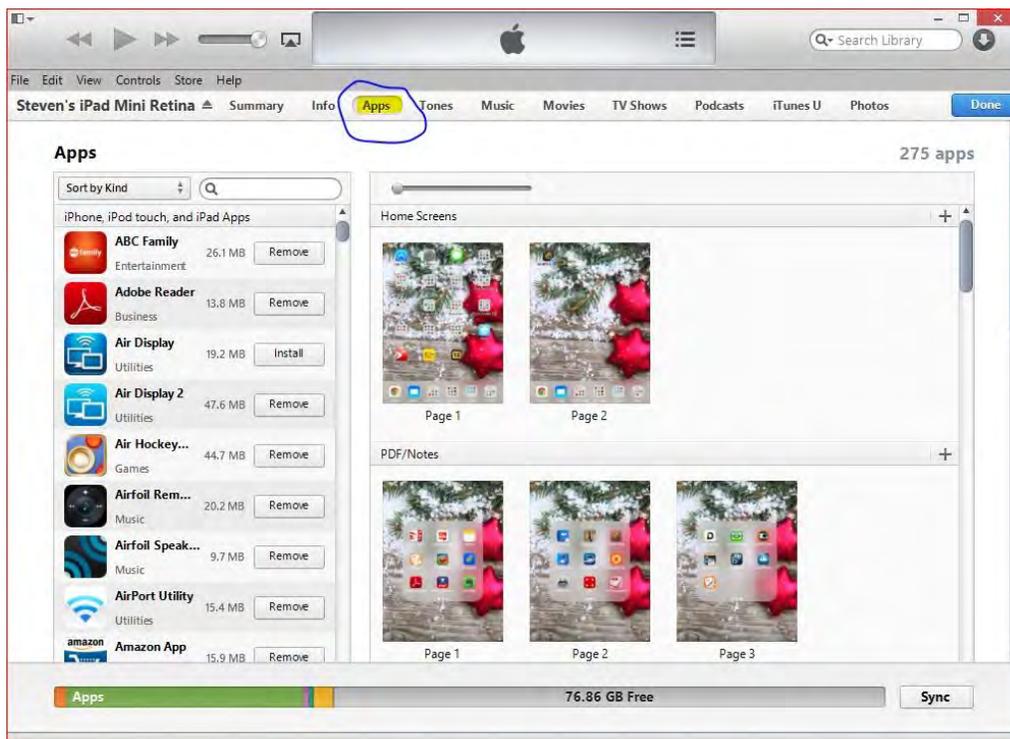
- iTunes
- Dropbox
- Apple's "Open In" dialog

### iTunes Transfer

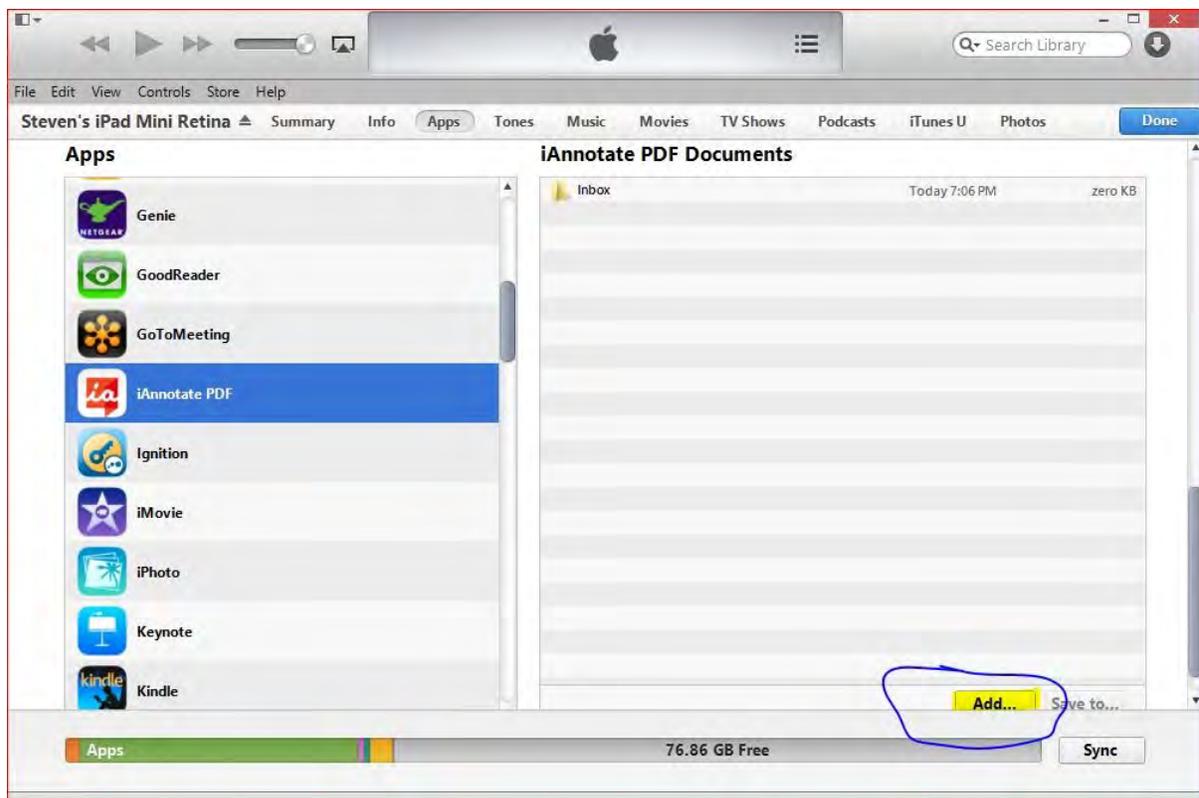
You can transfer compatible files to apps on your iPad by physically connecting your iPad to your desktop computer. To use this method, you must first have iTunes installed on your computer. iTunes is compatible with both Windows and Macintosh computers. Simply connect your iPad to your computer using the USB cable that you use to charge it. You can then select your iPad within iTunes to view data stored on it.



After you click on the button for your iPad, you will be taken to a screen with information for your iPad. To transfer documents to apps you have on your device, select the "Apps" tab from the top menu.



When you are on the "Apps" section for your iPad (in the iTunes program on your computer), you simply scroll to the bottom of the page for a list of the apps on your device that allow documents to be transferred between the computer and the iPad. Click on the app that you want to add a document to, and on the bottom of the window, there will be an



"Add.." button. Clicking this button opens a file select dialog that allows you to locate the file on your computer that you want to transfer. While in this window, you can also click on the "Save to.." button if there are documents on your iPad that you edited and you want to transfer back to your computer.

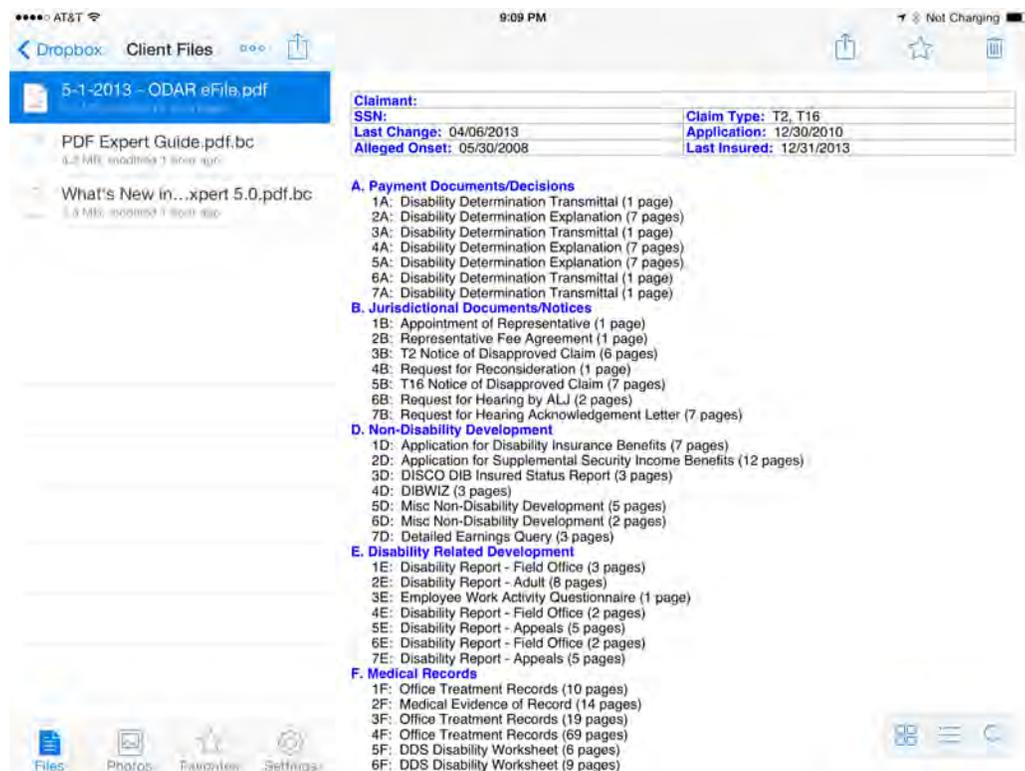
This method allows you to easily transfer files between your iPad and your desktop computer without the need to share protected documents with any third party services. Most PDF and Document apps support file transfer in this method.

## Dropbox

Dropbox is a file sharing service that you can subscribe to that allows you to transfer files between most devices. There are clients available for Windows, Macintosh, Linux, Android, iOS, and BlackBerry. You can also use a modern web browser to download and upload files even in operating systems without a dedicated application. The best part is that there is a basic account available for free that allows you to store up to 2 GB of documents.

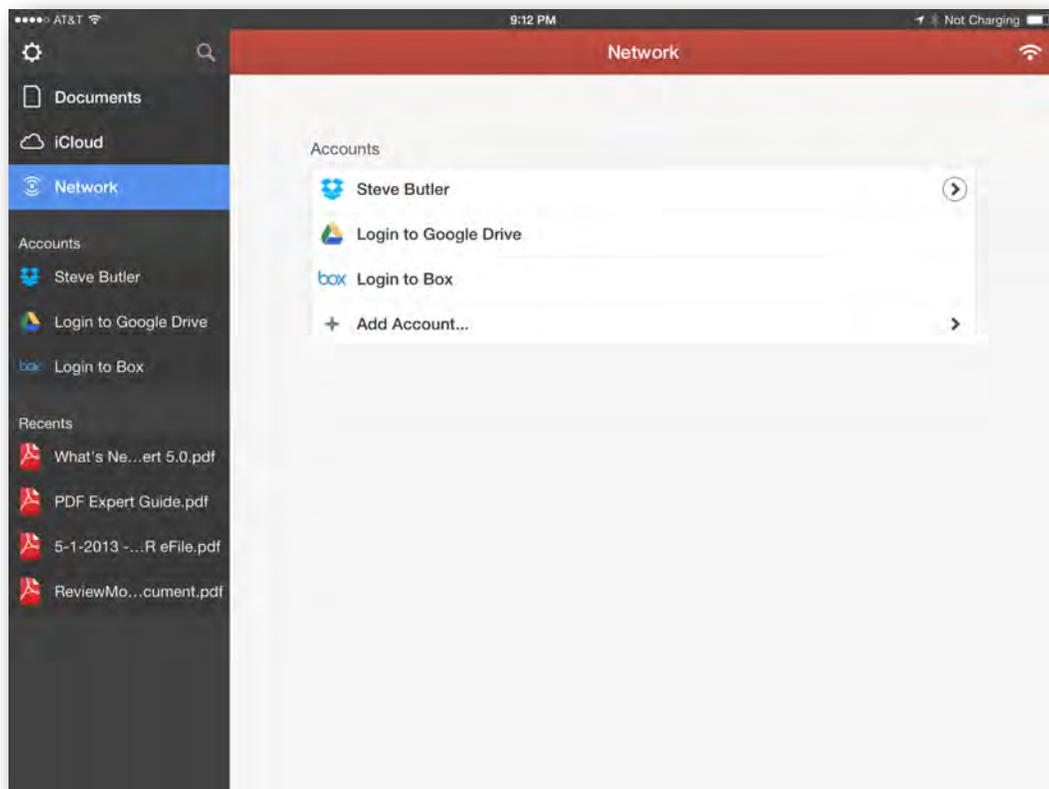
Once you register for Dropbox, you can install a client on your desktop computer that creates a "Dropbox" folder. Any documents that you want available in Dropbox, you simply copy or move into that folder. (I recommend copying, once you move a document into your Dropbox folder, it is synced with any other computer you install Dropbox on, this means that if you change the document on any computer, the change is synced across them all). If you do not want to install Dropbox, you can login to the web interface and upload documents there.

Once you install the free Dropbox app on your iPad, you can login and see any of the documents that you have stored in your Dropbox folder. The Dropbox app can even give you



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a preview of your document for most file formats directly in the Dropbox app. Most document editing/PDF apps also allow you to access your Dropbox account and import files.

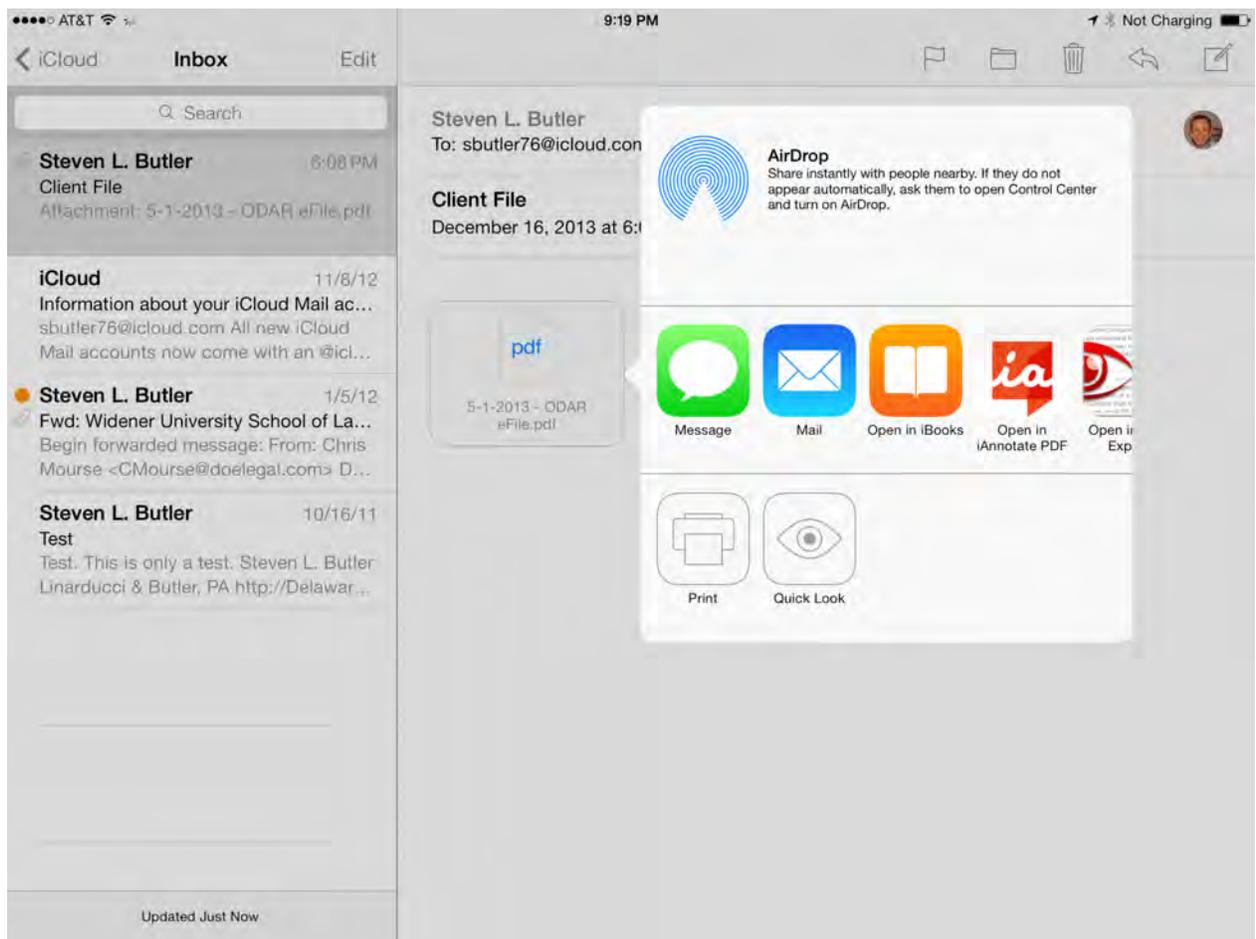


There are also other similar file sharing services that work in a similar way to Dropbox. The mostly widely used alternatives are Box, Google Drive, and Microsoft Skydrive. Chances are that the most popular apps will support most, if not all, of these services. I highlighted Dropbox simply because in my experience it is the most widely used and supported service.

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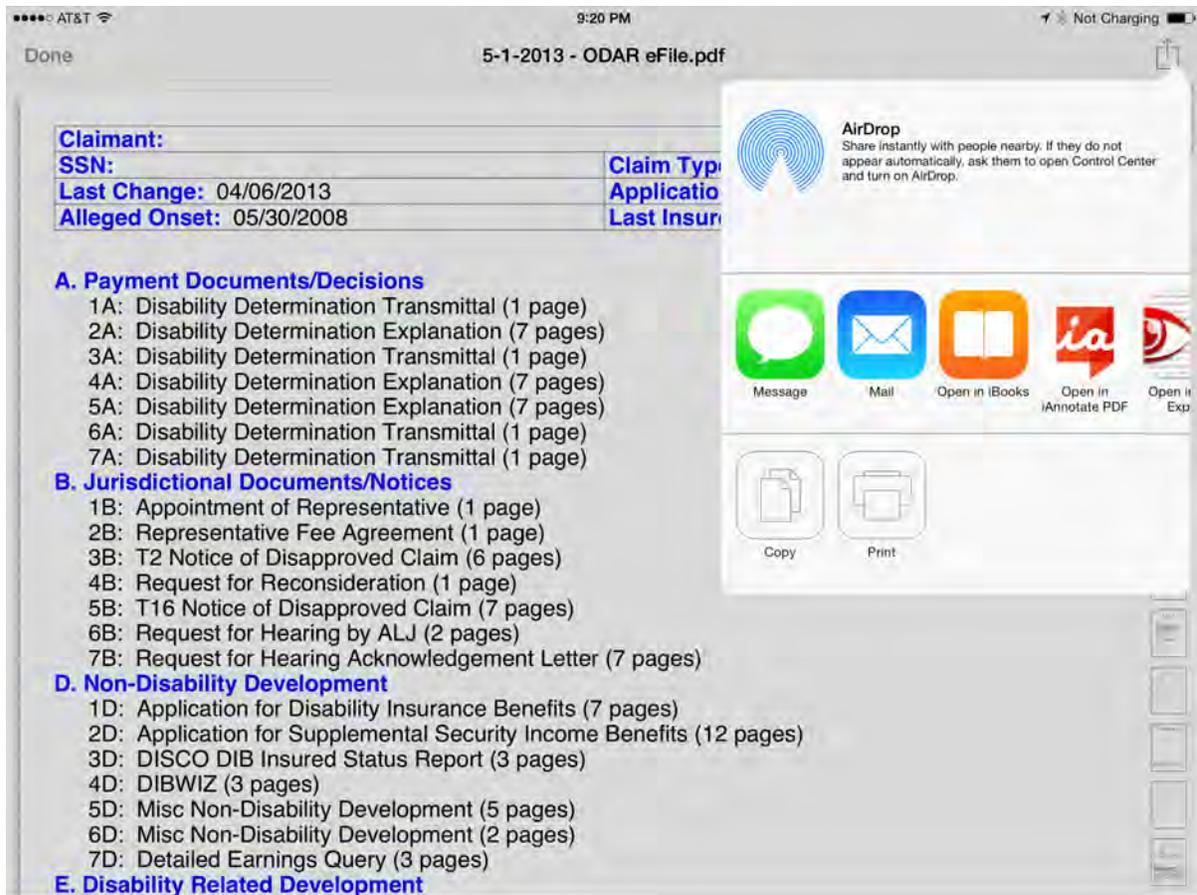
## Open In

If you are already able to view your file in an app on your iPad, "Open In" is also a solution for transferring the document to the specific app that you want to use for viewing and editing your document. "Open In" is a built in method in iOS for transferring documents between apps. For example, if you receive a document as an attachment to an email, you can easily open that document in any app that has registered with iOS that it is capable of viewing the document.



There are multiple methods for opening an attachment in an email with another application. One method is to simply hold down on the attachment until the "Open In" menu pops up (you must have downloaded the attachment first in order to see this menu). Once the "Open in" menu is on screen, you can scroll left and right through your available apps to choose the one that you want to use to view the document. Once you select the app, your document is sent to app, and the app launches.

If you touch the attachment, instead of holding down on it, the iPad will preview the document for you. If you are in the preview window, there is an icon in the top right corner of your screen to access the "Open In" menu. (This icon looks like a rectangle with an arrow



pointing out from the top of it). Again, once the "Open In" menu is on screen, you can scroll left or right to see the apps on your iPad that can accept the document.

Both methods provide you with the same options, so it does not matter which option you use. If you are inside an email when you launch "Open In" you do not disturb the original attachment, the iPad simply opens a copy of the document in the app that you choose. This dialog box is also available in many third party apps, including most document editors and file sharing applications. This method is very handy when you have been emailed a document that you need to edit or review.

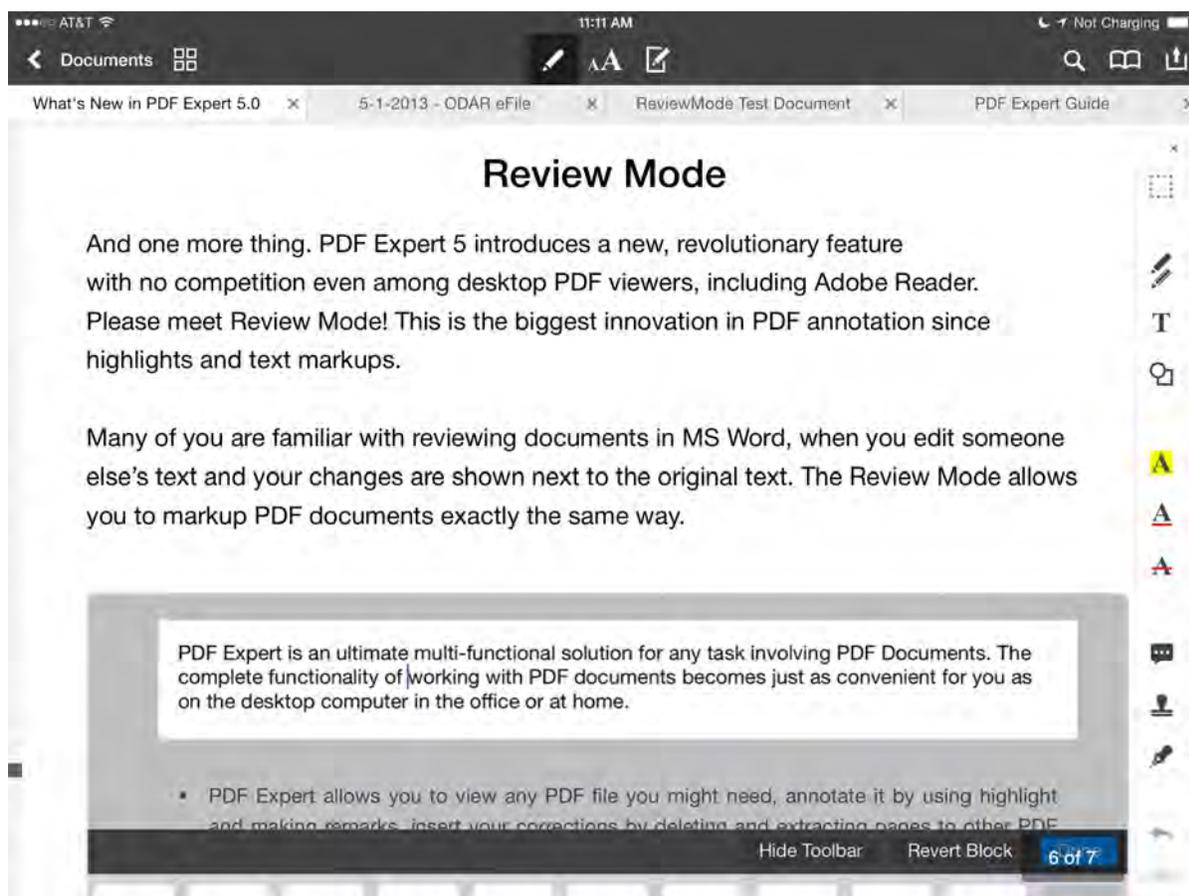
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## PDF Viewing and Editing on the iPad

There are dozens of apps available on the iPad for viewing and editing PDF documents. Although I have not tried them all, the two that I recommend are PDF Expert and iAnnotate. Both of these apps are full featured, and with the exception of a few small features, they operate in a similar manner. Both apps are available for \$9.99 from the app store, and will install on multiple devices. I will highlight some of the features of these apps below, and try to identify the pros and cons of each. But overall, you cannot do wrong with either, and based on the price, it probably would not hurt to have both.

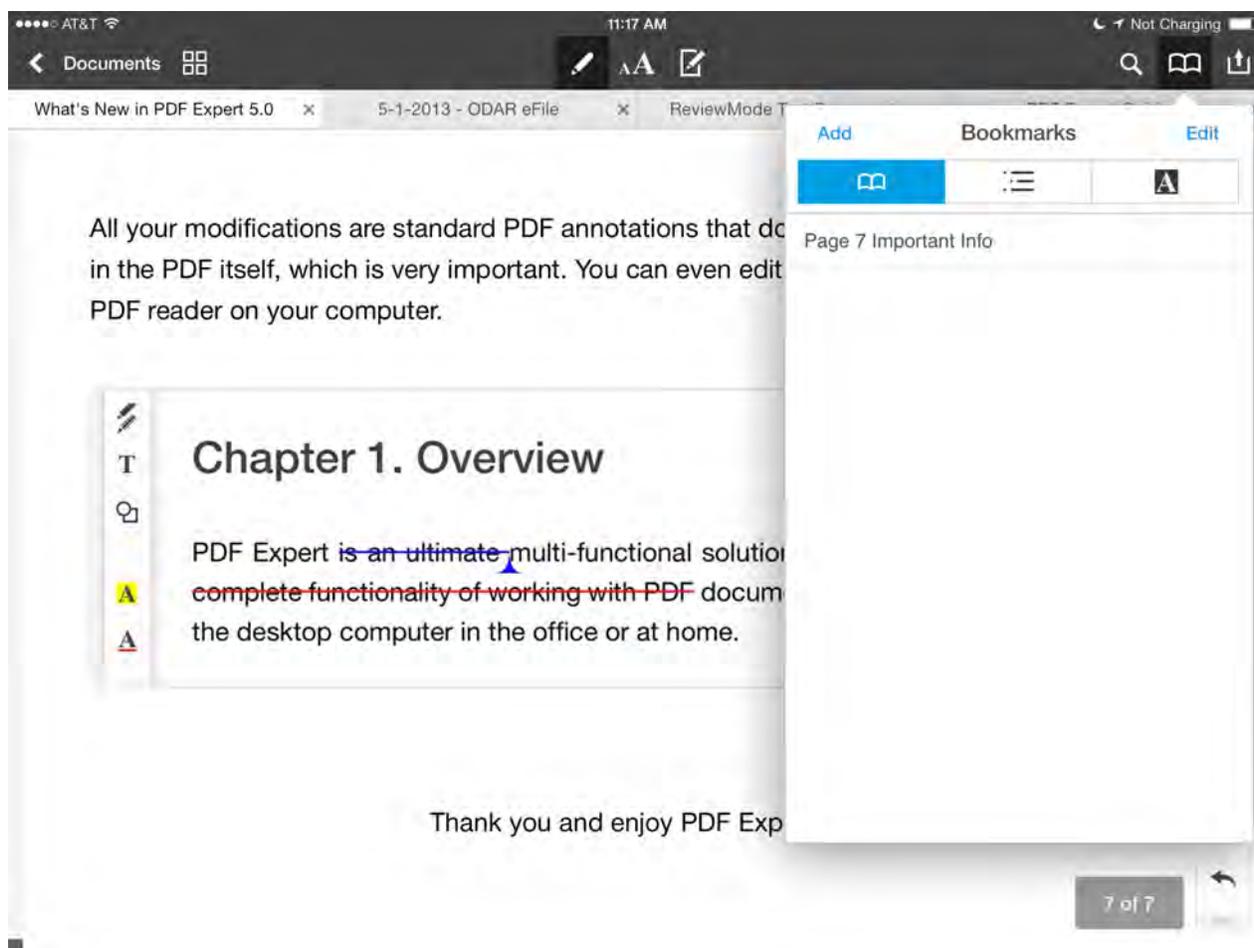
### PDF Expert (\$9.99 in App Store)

PDF Expert was recently updated to Version 5.0. Since this was a major release, this is the first time that users have been charged for an upgrade. I have not found any features that seem to be missing from the new version, but the PDF Viewer itself has been updated, a full-screen mode has been introduced, and a review mode has been added.

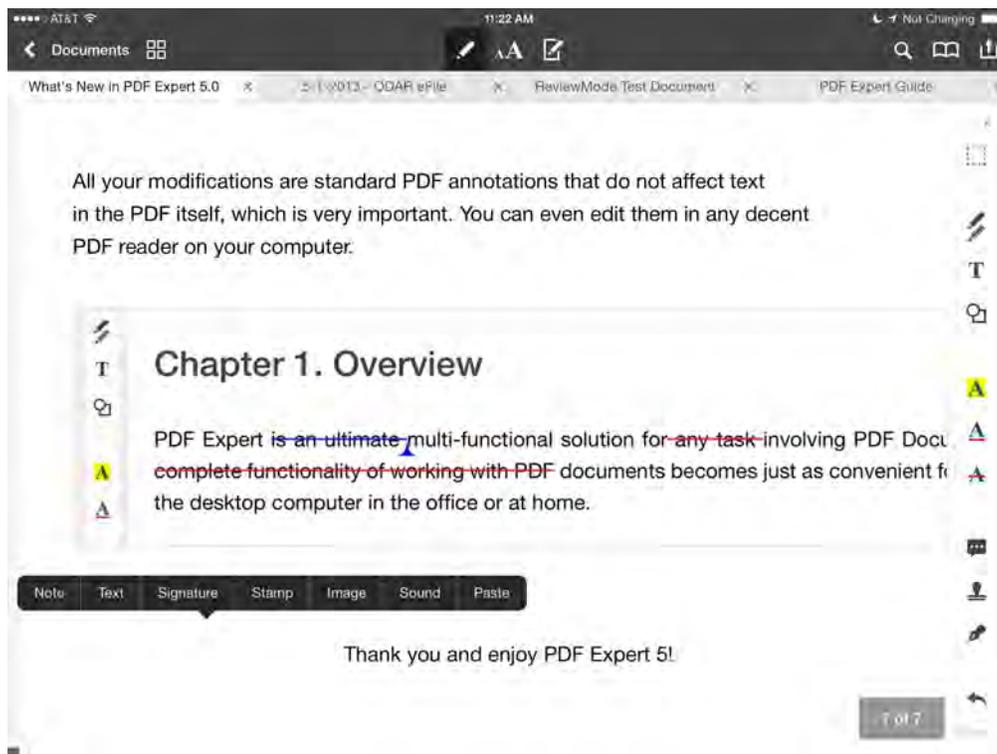


I mainly use the pencil tools when annotating my documents. The text tools will only work if you have previously OCR'ed your file, and text was found during the OCR process. If you try to use the text tools, and cannot make changes, this means that PDF Expert only recognizes your file as an image and you will have to use the text tools for highlighting. If you do not like marking over your text, it is also possible to select the shapes and draw a shape on top of the area that you want to draw attention to.

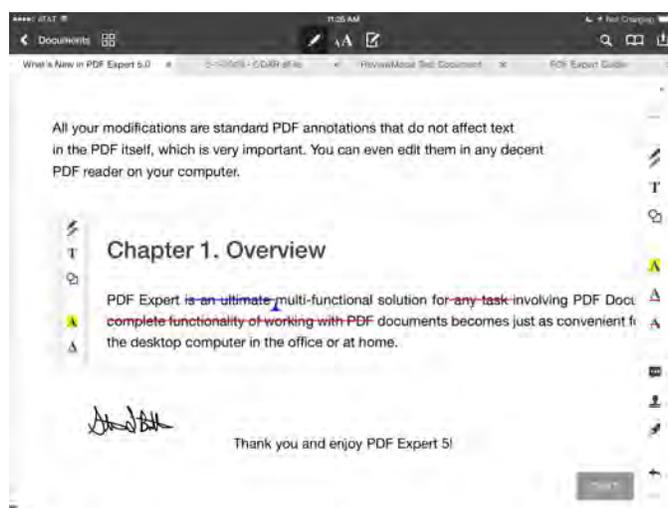
Bookmarking is also an important feature. I create bookmarks so I can quickly find a page in my file that I plan to refer to later. You can add bookmarks by choosing the book icon in the title bar section. Once you select the book icon, select it again in the drop down box, and you will see in the upper lefthand side an option to "Add". This is how you create your own bookmarks. If the document already has bookmarks, the new ones you create will be stored in a separate section.



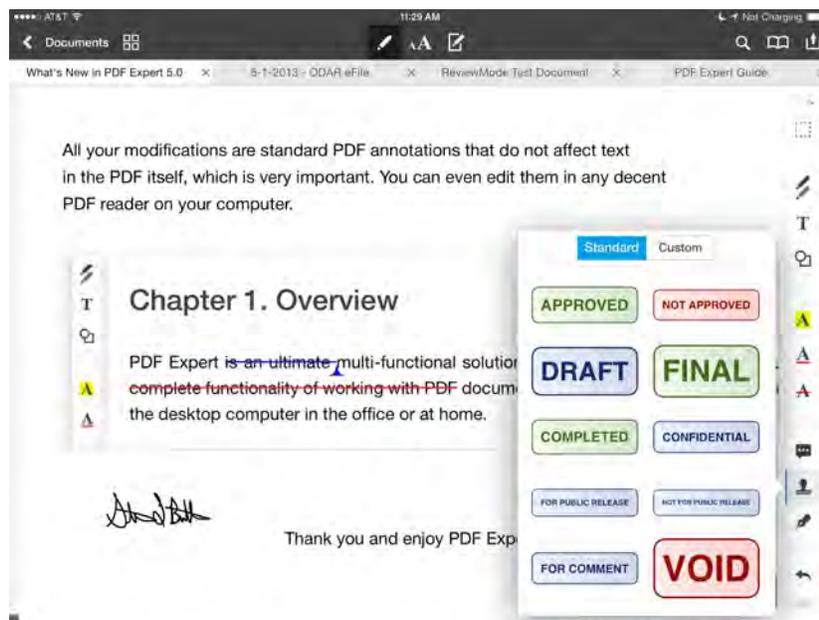
You can also easily add signatures to any of your PDF's by using the signature tool. The easiest method for using this tool is to press down on a blank portion of your document. This will bring up a menu, with "Signature" as an option. If you tap signature, you then have the option of using "My Signature" or "Customer Signature". If you use "My Signature", PDF Expert also saves a copy of your signature. "Customer Signature" simply creates an area for a customer to sign one time.



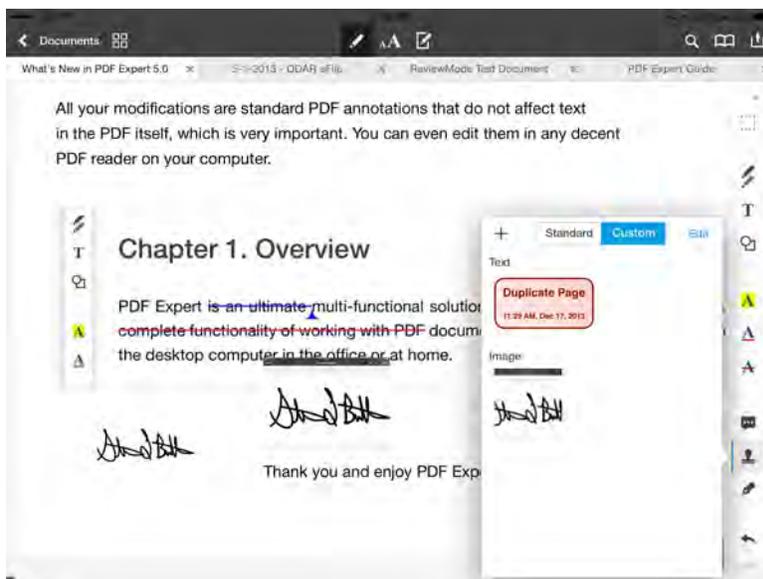
Once a signature is added, you may resize it and move it around your document.



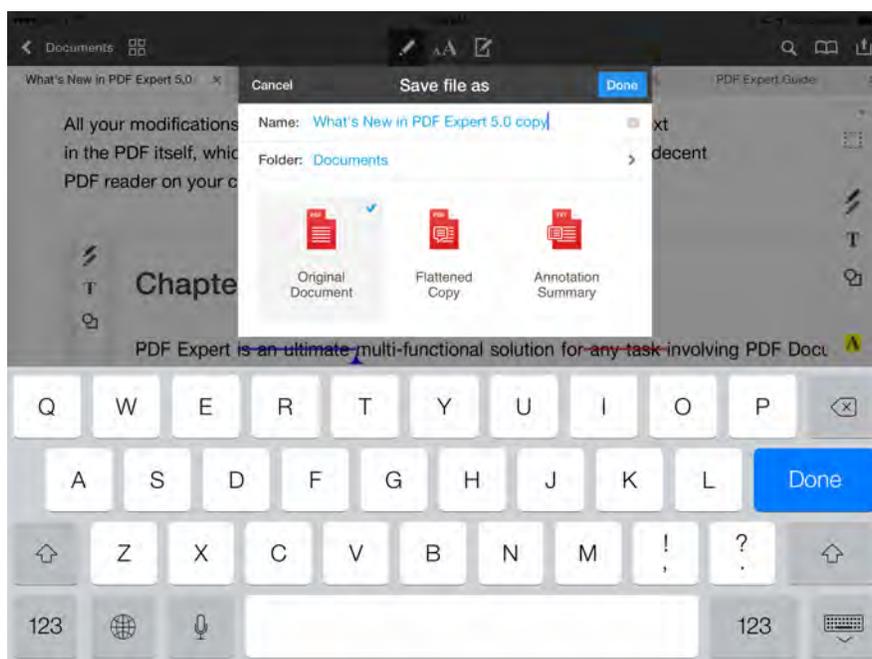
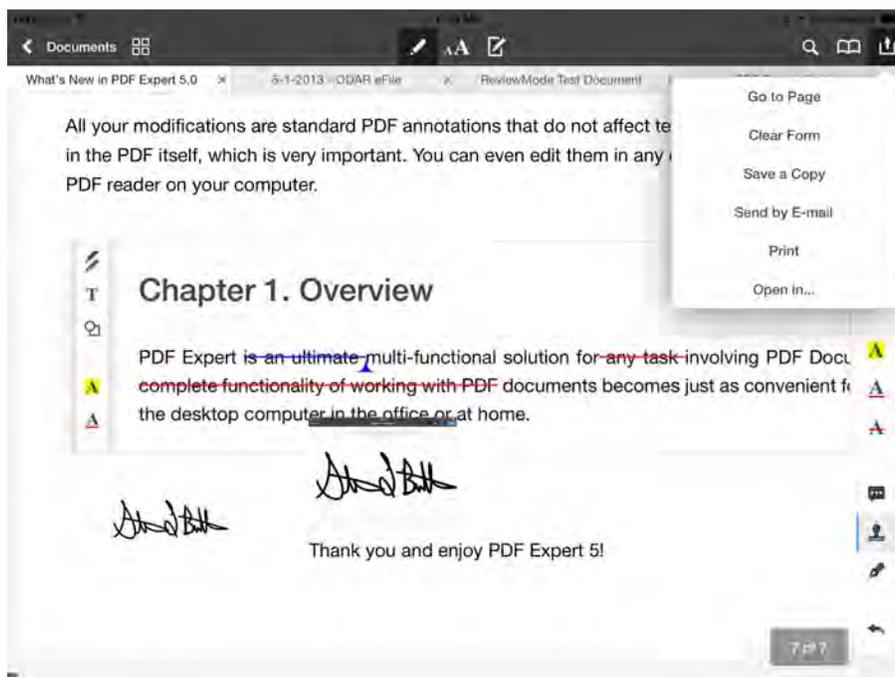
Stamps is a nice feature in PDF Expert that allows you to use either predefined or custom stamps on your PDF document. There is a huge library of standard stamps, but the area where PDF Expert excels is in allowing you to create your own Stamps, including "Dynamic Stamps" that can include the date or time. If I find a duplicate record in a file I am reviewing, I simply add a Duplicate Stamp that I have custom created. Creating new stamps



is as easy as clicking the "+" symbol in the Stamps dialog box. You can create either text or image stamps in this manner.

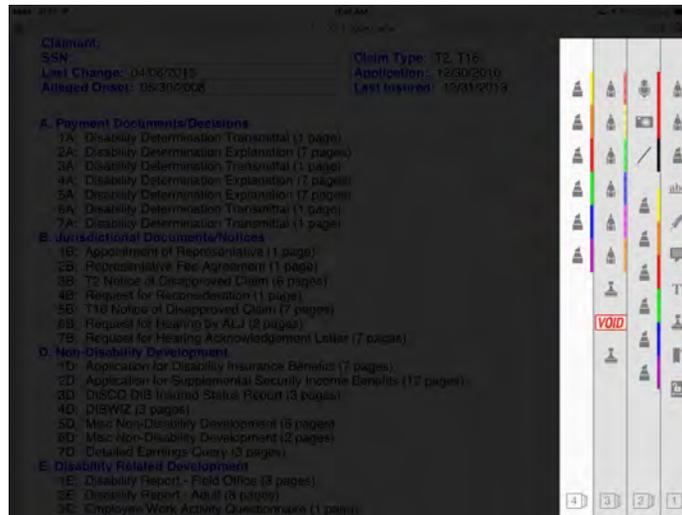


Finally, once you have made all your annotations, you can save the modified file and share it with others. If you do not want to allow others to change any of your annotations, you select a "Flattened Copy" in the save options, and your annotations become permanent. You can also create a text summary showing your annotations so that you can easily view a list of all the changes you made.

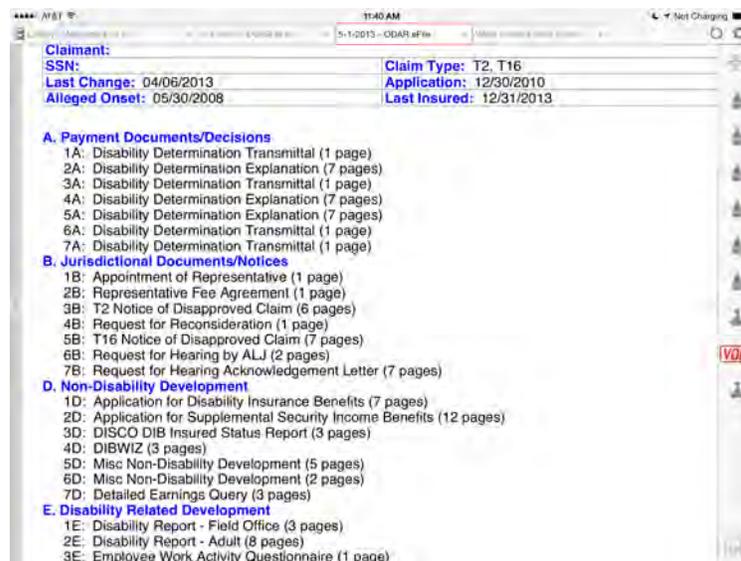


## iAnnotate

iAnnotate also recently went through a major update, but like all other updates thus far, it continued to be free to those that had already purchased. For new users, it only costs \$9.99 to purchase iAnnotate for your iPad. As the name implies, annotation is the central theme of this PDF editor, and the area where it excels at. The main reason I recommend this program is because of the ability to customize the annotation toolbar and to add multiple toolbars for different purposes.



I have created a custom toolbar in iAnnotate that I use whenever I am reviewing medical records. This allows me to quickly review my file, and easily find the annotation tool I want immediately.



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Both PDF Expert and iAnnotate allow you to quickly access different files, by keeping a tab bar across the top with a list off all your open files. While viewing a document, you can easily switch to a different open document by just tapping on the tab.

I also find that it is easier to quickly scroll between pages in iAnnotate, but I am disappointed that you cannot customize dynamic stamps. Since both of these apps are relatively inexpensive (at \$9.99 each), I often recommend that you download each of them and determine which best fills your need. Both of them also offer syncing with most major cloud sharing services, including Dropbox and Box.

### **Conclusion**

The important thing to remember is if you have the right tools, your iPad becomes a great resource for quickly reviewing and annotating documents, and at a fraction of the cost of traditional desktop methods. The best thing to do is download these apps and read the user manuals for great ideas on how to maximize for your own use.