

## TECHNOLOGY UPDATE

### NMB E-Forms

By Jerry Wallin, NARR VP-Western Region

Our new/re-re-elected NARR president, David Vaughn, asked each of the organization's new/re-elected vice-presidents to assume responsibility for a particular sector of interest to the organization. Dave asked me to monitor technology developments and to periodically relay information about that subject to the executive board and the membership. I was pleased to accept his request.

I hope by now you have begun working with the new NMB E-forms. They became available for optional use by neutrals October 1, 2004 but will become the mandatory means of filing forms with the NMB effective January 1, 2005. Therefore, it is to your advantage to become familiar with the forms and begin using them full-time as soon as possible.

For those of you who have become acquainted with the E-forms, no doubt you have by now formed some kind of a love-hate relationship with them. Like any computerized application, procedures are important and the sooner you can become familiar with the quirks and shortcuts, the sooner you will turn your present relationship into a budding romance.

As you may have guessed, I have become quite fond of the E-form capability. My experience has been that the E-form process has cut about five calendar days off the previous time it took to receive compensation payments and/or travel expense reimbursements. Indeed, I was paid in as little as two days this past summer! In addition, I like being able to send in travel reimbursement claims as soon as the trip is completed rather than wait until the end of a month to mail the whole group. Finally, it saves me time to be able to print file copies of a form rather than go to another room at my office to make copies. Yesterday (October 30<sup>th</sup>), I finished my Form 6 for December and my Forms 7 and 8 for October in about a total of ten minutes. That included printing my own file copies and emailing the E-forms to Carol Conrad at the NMB.

**REMINDER:** Email your Eforms to [arb@nmb.gov](mailto:arb@nmb.gov) and not to Carol directly. That way, any of the NMB arbitration staff can process your Eforms. It should speed up the process for those times when Carol is busy.

As you may know, NARR had five beta-testers (Quinn, Conway, Kenis, Ross, and me) working with the E-forms development project this past summer. As items for correction were encountered, suggestions for improvement were funneled to the NMB. Rachel Barbour and Dan Rainey took the laboring oar from the NMB's end. Rachel was very responsive to my suggestions and readily acted on them. In the end, I think they have produced a capability that is a significant administrative improvement for referees. Nonetheless, there are still procedures that fall in the category of "know-how" that referees can follow to improve the utility of the E-forms even more. I have three suggestions for you.

## 1. Obtaining/Creating customized forms

As they come to you via download from the NMB website, the E-forms are no cost. The forms consist of .PDF (portable document format) files that can be completed using free Reader software from Adobe Systems. You can print the forms with free PDF995 software. Rachel's User Manual describes how to obtain this free software and how to use it. Together, these two software applications let you do the basic work without cost.

One thing you will learn early on from working with the forms is that you must re-type your name, address, phone number, and electronic signature information on each form each time you complete a set of forms for a given month. This is because the free Reader software will not let you "save" any changes to the blank forms you download from the NMB. While Reader does let you fill in the blanks on the forms, the only way to "save" your work is to "print" a .PDF file via PDF995; once you exit from Reader, it deletes all information you entered. The next time you retrieve the NMB form, you will find it to be, once again, blank. Moreover, the completed form you "printed" with PDF995 cannot be edited with Reader—it can be viewed and printed as a hardcopy but not changed. That means the forms you intend to file for the next month will require you to again type in your name, address, etc.

There are three ways to obtain forms that are personalized with your name, address, etc. so you do not have to re-type this boilerplate information each month.

### *Buy Adobe Acrobat Standard 6.0*

As I said, Adobe Reader just lets you fill in a form but does not let you save those changes. It discards all changes when you exit the program. That is because Adobe Systems wants to sell you its full Acrobat program, which will let you do all sorts of things with .PDF files in addition to saving your changes. With Acrobat, you can take the blank NMB forms and type in your boilerplate information and then save the form with the information intact. That way, when you pull-up the form for next month, it will already have your basic information filled in. But the full Acrobat Standard Version 6.0 costs about \$400 on the internet, which is rather pricey for a one-time use to create custom forms. With the advent of NRAB submissions on CDs, it may be worthwhile to buy Acrobat 6.0 because it allows you to do some neat things with the submissions to eliminate our previous paper-intensive analysis of the record. But for those of you who do not want to buy Acrobat 6.0, there are two no-cost ways of obtaining a set of forms personalized to you.

### *Download Adobe Acrobat 6.0 Trial version*

Adobe Systems will allow you to try a fully-functional version of Acrobat 6.0 for 30 days free of charge. At least that was their offer this past summer. Go to their website, [www.adobe.com](http://www.adobe.com), and download the trial version. During your trial month, you can retrieve each of the blank NMB forms and fill in your boilerplate information and then save the form. The next time you pull them up with Reader, you will find that your name, address, etc. is already present and you will still be able to fill in the rest of the blanks with your case data, travel request, and so forth. After completing the form, you can print it via PDF995 as you did before to create a .PDF file to email to the NMB. After your trial version expires, your customized forms should still work for you. This is what I did during the beta testing phase and it worked for me.

Ask a colleague who has the full Acrobat program to create a set of customized forms for you.

After playing around with the trail version, I decided to buy the full Acrobat Standard 6.0 Edition a few months ago because I wanted to begin working with the electronic submissions now required by the NRAB. As a result, I am willing to prepare a set of customized forms for any NARR members who would like to have them. Just email me with your boilerplate information and I will send back your personalized forms. If you wish, you can include your “secret” electronic signature and I will put that on for you as well and then promptly forget it. When you think about it, the e-signature is really a tool the NMB uses to verify the authenticity of the forms you send in to them. It satisfies their auditing requirements. Beyond that, however, I haven’t figured out how the knowledge of that information would benefit anyone other than the referee to which it applies. I don’t intend to send in pay claims for anybody else nor would I put some other referee’s e-signature on my forms. So, if you want me to include that information on personalized forms, sleep comfortably knowing that the end of the world will likely not result from having divulged it.

## 2. Use of the Auto-Complete feature of Adobe Acrobat or Reader

Both Reader and Acrobat provide an auto-complete feature to assist with the repetitive completion of forms. While the feature has surface appeal, I found it to be more hindrance than help, especially when completing Form 8 reports of activity. After trying the feature for a couple of months, I eventually turned it off in favor of keying in each entry. This is why I did so.

The auto-complete feature “remembers” what you type into each kind of box on the E-forms. Thereafter, whenever to tab your cursor back into the box, whether you are continuing to complete the same form or you are creating a new form for a different month, the feature will *prompt* you with an entry. For example, Form 8 has a column for travel time that calls for entries of whole days or fractions of days. Once you enter either a “1” or a fraction such as “½” in the Travel time column on any Form 8, each time you tab or move your cursor into that column thereafter, the auto-complete feature will enter that same 1 or ½ for you. If you do not want the prompted entry, you must hit either Delete or Backspace to remove it before tabbing to the next column. If you don’t, the entry will be made for you and your form will be incorrect. (Tip No. 3 discusses this in more detail.)

Auto-complete does the same thing with date entries. I found that the prompted date was almost never the correct entry I wanted; it invariably was prompting me with last month’s dates that were not applicable to the form for the month I was completing.

I found that it was quicker and less error prone to manually key in each entry I wanted to make on the E-forms. I use the Tab key to move across the columns on Form 8 as I complete each line of case data and I don’t need to worry about Deleting or Backspacing in the Travel time or Hearing time columns to prevent an unwanted entry from being made in error.

Each of you might want to try the auto-compete feature to see if you have different preferences than me. Rachel’s User Manual describes how to turn the feature on and off.

## 3. Error Correction

If you never make an error on your E-forms you won’t need this tip. If you do make an error, however, it will save you from having to re-type the form all over again. I ran into this problem after

I noticed a single error on a Form 8 after filling in twenty days worth of case data. Because of the procedural sequence I had followed, I had to start all over again and fill in the whole form from scratch just to remove one incorrect entry that had been entered in the Travel time column by the auto-complete feature. Had I followed a slightly different procedural sequence, I could have easily made the single correction without having to re-complete the whole form.

Recall that the way to preserve or “save” your completed forms for sending to the NMB is to “print” them using PDF995. As Rachel’s User Manual explains, PDF995 doesn’t really print a form. Instead it creates a .PDF file that you can attach to your email to the NMB.

When I started beta testing the E-forms, I thought to myself, “Great, now I don’t need to make hardcopies for filing anymore.” I planned to just save the form files on my hard disk. (Windows now calls them “Folders” but I grew up in personal computing when they were called “Files” so I tend to default to that term. Please forgive me.) After completing a Form 8 with a full twenty days of entries, I failed to proofread it carefully. Assuming it to be correct, I exited Reader and unwittingly caused myself the problem. Remember Reader discards all entries when you exit from it.

The point of this tip is to stress the importance of checking your form for accuracy before you exit Reader. If you find an error at this juncture, you can easily place your cursor over the offending entry and correct it.

What I did wrong was assume that the Form 8 I “printed” with PDF995 was correct. So I exited Adobe Reader before I checked it. When I noticed the error, I had no choice but to pull up the blank form and re-enter the whole twenty days of data and then “print” the form with PDF995 once again.

Although the procedure is slightly different, it doesn’t make any difference whether you do your proofreading before or after you “print” the form with PDF995. If you haven’t “printed” your completed form, just make the necessary corrections and then “print” it just once. If you have “printed” the form before you discover the error, don’t panic – as long as you haven’t exited Reader, it still has your completed form available for making corrections. It is just hidden from view. When you “print” with PDF995, it asks you for a folder name and then does its work. When finished, it will show you the “printed” form as the top window on your screen. Your correctable form is still lurking beneath it alive and well. If you discover the need to make a change, just delete the top window by clicking on its little “X” near the upper right corner of the window. That will allow the correctable form to appear. Go ahead and make your correction and then “re-print” the form. You are done. DO NOT click on the big red “X” in the upper right corner of your screen when trying to delete the top window because this will exit you from Reader and all your data entries will be lost.

If any of you want to discuss the foregoing tips in more detail, please email me at [jjwallin@usa.net](mailto:jjwallin@usa.net) or call at 775-828-0567, which is in the Pacific Time Zone. For you early morning callers, please keep in mind that Pacific time is three hours behind Eastern. If you come up with tips of your own, please let me know so they can be passed on, with proper attribution, to the rest of the membership.

NARRator, November 2004