

Chapter 5 - Patient Letters

Step-Ahead boasts a sophisticated built-in word processing facility which will aid you in taking care of your written correspondence, both to your clients and to other businesses.

The basics of Step-Ahead word processing

In order to make full use of letter writing in Step-Ahead, there are a few basic terms and concepts that need explaining.

Document (Letter)

A letter can either be prepared using a template or can be typed in directly by the user. In either case letters can be distinguished from templates by a date appearing next to their name, rather than the word "*template*". Step-Ahead automatically organises letters according to the patient name you currently have open. That is, when you open the letters window you will only see the letters that you have saved for that specific patient.

Template

A special file created by the user that can be used repeatedly for letter preparation. Templates are "pro-formers" that usually contain references to database fields within Step-Ahead. Templates are used when the user wishes to have database information automatically "filled-in" by Step-Ahead. For example, you could create a simple template which would fill in the patient name, address and the date onto a standardised medical certificate pro-former. Once created this template can be used over and over for each patient, producing professional looking certificates without the need to type. A template can only be created when there is a patient name in the title bar. Once saved, however, that template will be available for every patient that you may open. Templates can be recognised by the word "template" next to the template name. Once you have prepared a letter using a template, you can customise and then save it as a letter.

Word wrap

When writing letters there is no need to press the enter key when the cursor reaches the right hand edge of the screen. All word processing programs will automatically wrap a semi-completed word down to the next line of your letter. Remember to just keep typing and Step-Ahead will "word-wrap" as you go.

Creating a patient letter

Before attempting to create letters you must have a patient name open at the top of the screen. Make certain you have the correct patient open and press the PATIENT then LETTERS commands to display the following window :

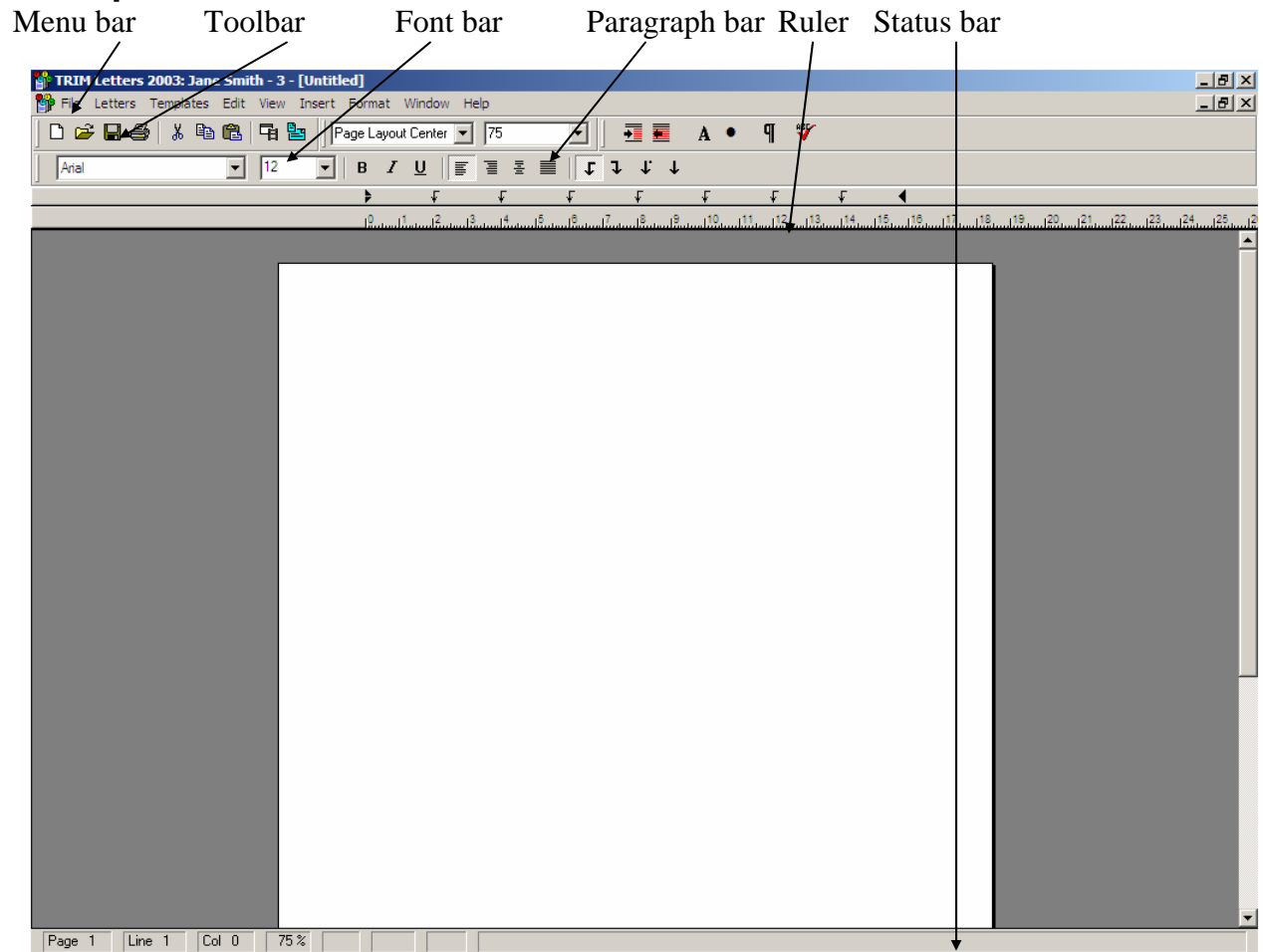
The letters main window

The letters window, although seemingly complex, is actually simple to use. When entering a letter, you also have access to almost any other aspect of Step-Ahead simultaneously. For example, it is possible to work on a letter for one particular patient and then quickly jump to the accounts screen for another. When you have finished the extra task, you don't have to worry about losing your place because your letter remains visible the whole time.

Step-Ahead User Guide

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Step-Ahead 2003, XP Compatible

The operations area



The operations area comprises the various bars. It is where all the document retrieval and text formatting functions are available. The buttons here allow you to format text, change page sizes, adjust margins or open previously saved letters or templates.

File Menu

- | | |
|------------------|---|
| New | Opens a new blank window in which to begin typing |
| Open | Displays a file search form in which to retrieve the file to open |
| Save | Saves current open window into existing file or displays file save form |
| Save as ... | Displays file save form in which to specify file name, type and location. |
| Save as JPEG ... | Creates an image of the document and displays file save form to save it |
| -- | |
| Print | Prints current open window |
| Print Preview | Displays current open window as a printed document |
| -- | |
| Close | Closes current open window with prompt to save it if it has changed |
| -- | |
| Exit | Exits Trim Letters and returns to previous function. |

Letters Menu

- Select > Displays list of saved letters for this client to select one to open
-
- New Opens new blank window for typing letter or report
- Delete Displays list of saved letters for this client to select one to delete

Templates Menu

- Select > Displays list of saved templates to select one to use as basis for new letter
-
- New Opens new blank window for typing a template
- Edit > Displays list of saved templates to select one to edit as a template
- Delete > Displays list of saved templates to select one to delete
-
- Insert Database Field.. Displays list of available database fields to choose one to insert at cursor

Edit menu

- Undo Input Undoes last typing, insert, edit or format function
- Redo Redoes last undo
-
- Cut Clears any highlighted text into the clipboard
- Copy Copies any highlighted text to the clipboard
- Paste Pastes any text from the clipboard to the document at cursor position
- Delete Clears any highlighted text without saving it to the clipboard
-
- Search... Displays search form to find specified text
- Replace... Displays replace form to search and replace specified texts
-
- Select All [Ctrl+A] Selects and highlights whole document for edit tasks above

View Menu

- Toolbar
- Font bar
- Paragraph bar
- Ruler
- Status bar
-
- Control characters
-
- Layout >
- Zoom >

Insert Menu

- Text...
 - Image >
 - OLE Object >
 - Table
-

Format Menu

Text Displays font form to change font properties of highlighted text.
Text Colour Displays colour form to change colour of highlighted text
Text Background Colour Displays colour form to change background colour of highlighted text
--
Paragraph
Frames...
Table
Image...
--
Document...

Window Menu

Cascade
Tile horizontal
Tile Vertical
Arrange
--
[List of Names of open windows]

Help Menu

Contents...
--
About...

Toolbars

The toolbars contains shortcut buttons for the most commonly used functions.
From left to right they are:



File buttons: New, Open, Save and Print.



Edit buttons: Cut, Copy and Paste



Opens video stills form to insert stills into document



Change document between portrait and landscape - remember to change printer properties also to match before printing.



Adjusts typing page location and magnification in window



Indents and outdents current paragraph



Change selected text font and colour characteristics



Toggles display or suppression of hidden characters such as paragraph marks



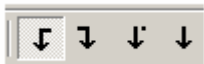
Spell check document or selected text



Font type, size, bold, italic and underline



Left, right, centre and justify paragraph alignment



Set left, right, decimal and not justified tabs on ruler

The ruler

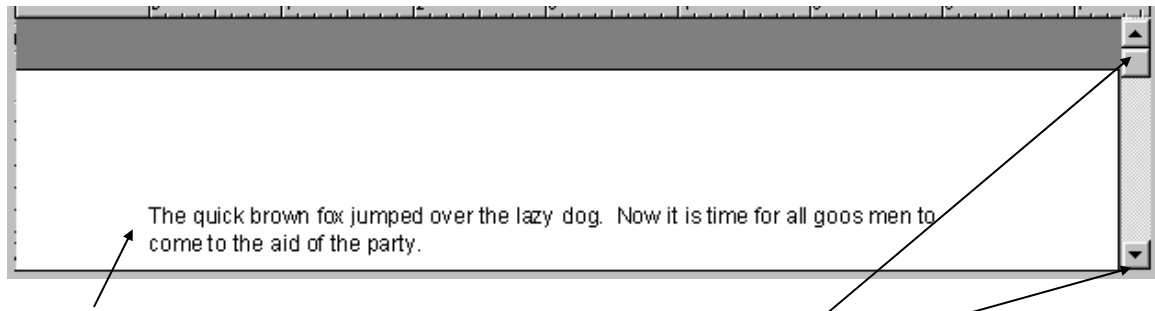
The ruler area is designed primarily for allowing you to measure your page width. It has the additional function of displaying any tab settings that you may have created in your document. Tab settings are useful for aligning text in unusual places such as a placing a name or address on the right hand side of the page, rather than the left.



The base measurement unit is inches and tab settings can be either left, right, centre or not justified. To move a tab setting, *Click* directly on the appropriate marker and hold the mouse button down. Now drag it to the new position. If entering a new tab setting just click using the mouse in the desired location.

The main text window

The main text window is where you type your document text . Your position within the letter is shown by a small flashing vertical line called a "cursor". The main text window can be re-sized and viewed in one of four possible modes.

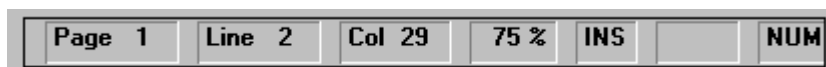


Main Text Area. Press this arrow to move the visible text area up or down.

The available viewing modes are: 25%, 50%, 75% and 100% modes.

The status bar

The status bar acts as your document "navigator". The status bar makes it fast and easy for you to locate where the cursor is currently positioned within the document.



The current page, line number, column position, insert mode and number mode can all be viewed at any time.

Miscellaneous letter functions

Formatting Text

Enter as much of your letters in one go as you can. It is far easier to "format" your document and make it look professional after you have entered your complete letter, rather than in small repeated stages whilst typing.

Entering A New Letter

To start entering a new letter press the *NEW LETTER* speed button in the *Operations Area*.



This will open a new window and place the cursor in the top left hand corner. You are now ready to start typing.

Setting Letter Margins

The left, right, top and bottom margins can be easily changed within Step-Ahead letters by sliding the left and right markers on the ruler.

Choosing Portrait / Landscape

The paper orientation can be toggled at any time by pressing the *PORTRAIT / LANDSCAPE* speed button.



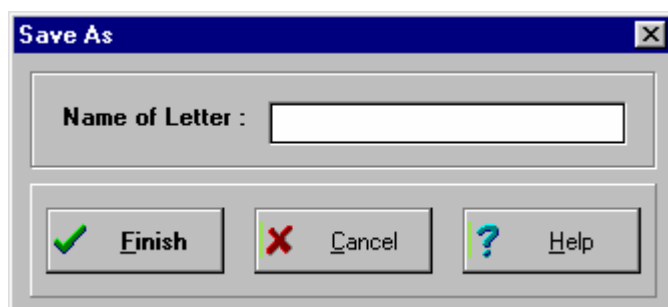
The current size of the paper is irrelevant to this operation. Pressing this speed button rotates your document ninety degrees. It is important to note that when printing a landscaped document you must be sure that the printer properties have also been adjusted to "landscape" in order to match your document.

Saving A Letter

Press the *SAVE* speed button :



To invoke the following window :



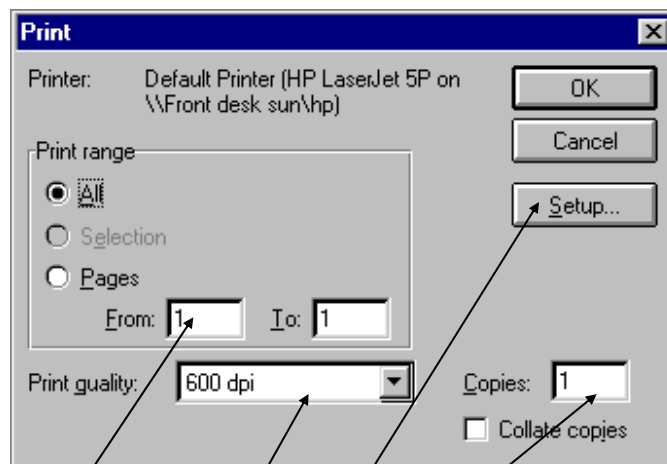
Type the name you wish to use for your letter. You have a limit of eight characters (use only alpha characters). Step-Ahead will limit you if you try to type more than this. Press the *FINISH* button to store your letter. Once saved, you will notice this filename appearing in the *Files* list (drop-down list) with a date beside it.

Printing A Letter

To print your typed letter press the *PRINT* speed button :



The following standard print options window will appear :



Choosing The Print Range

Press the *All* radio button to tell Step-Ahead to print all the pages in your document. Press the *Pages* radio button and then enter values in the *From* and *To* fields.

Adjusting The Print Quality

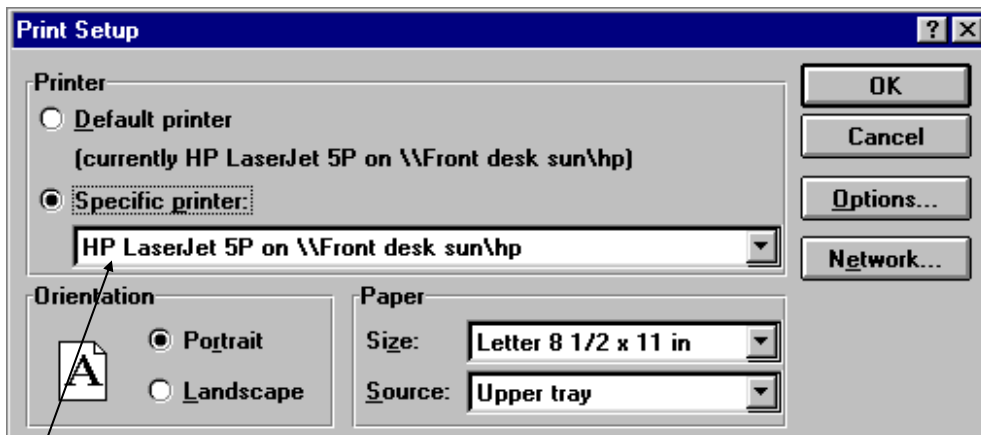
Use the mouse to modify the value in the *Print Quality* drop-down list box.

Changing The Number Of Copies

Use the mouse or *TAB* key to click into the copies field and then type the number of copies that you would like.

Modifying The Printer Setup

Press the *SETUP* button to modify additional details of the current print job. Doing so will invoke the following window :



Selecting The Printer For A Letter

Press the *Default Printer* radio button to instruct Step-Ahead to route your letter to the printer installed as the windows default.

Press the *Specific Printer* radio button and then select a printer from the *Specific Printer* drop-down list. This instructs Step-Ahead that your letter will be routed only to the chosen printer.

Selecting Paper Orientation

Press the *Portrait* radio button to print your letter on vertical A4 paper.

Press the *Landscape* radio button to print your letter on horizontal A5 paper.

Selecting Paper Type

Use the mouse to print your letter on the desired paper size from the *Size* drop-down list.

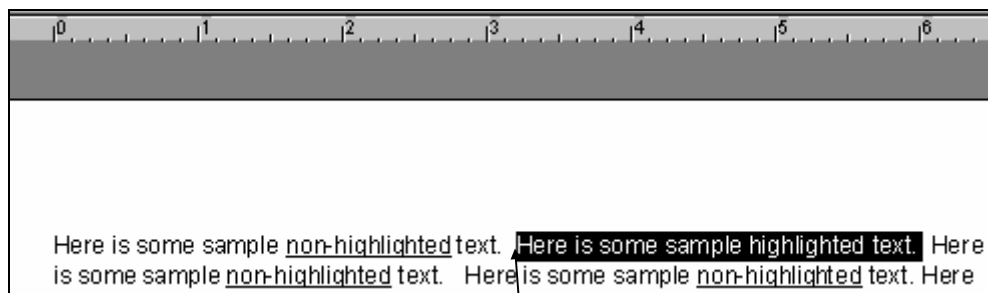
Use the mouse to print your letter from the desired paper source from the *Source* drop-down list.

Modifying The Basic Printer Options

Press the *OPTIONS* button to open a printer specific settings window. Each printer will have a visually different options window, however, they will almost allow you to modify : Economy settings, graphics intensity, font selection and memory usage.

Selecting text in a letter

Text selection is needed to perform many of the basic tasks of the Step-Ahead word processor, such as *bolding*, *copying*, *enlarging* or *paragraph formatting*. Text selection can occur in one of two ways.



Use The Mouse To Highlight

Move the mouse pointer to the start of the text that you wish to highlight. *Left-Click* and **HOLD**

the mouse button down, moving the mouse to the end of the text to be highlighted. You will notice the background of the text become inverted. Your text is now highlighted.

Using Keystrokes To Highlight

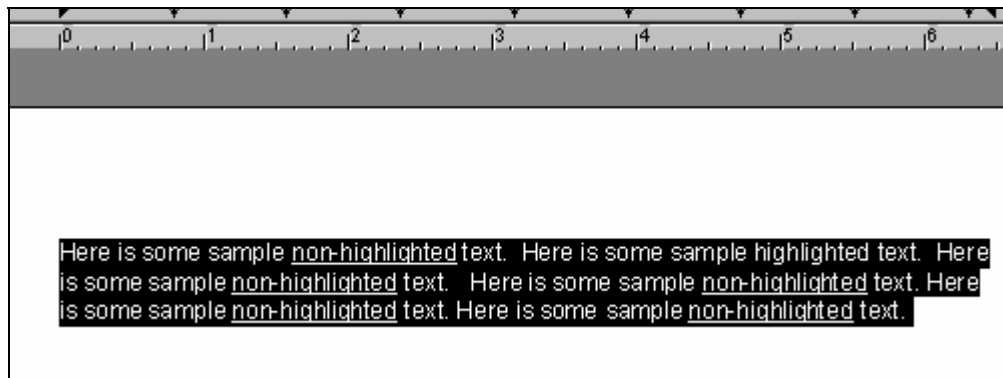
Use the *UP*, *DOWN*, *LEFT* or *RIGHT* arrow keys to move the cursor to the start of the text to be highlighted. Hold the *SHIFT* key down and use the *UP*, *DOWN*, *LEFT* or *RIGHT* arrow keys to move the cursor to the end of the text to be highlighted. You will notice as you move the cursor that your text becomes inverted. Your text is now highlighted.

Select all

Press the *SELECT ALL* speed button to select and highlight your entire document.



This is useful for *Copying* your whole document into the clipboard so you can later paste it into another application.



Copying, cutting, and pasting into letters

Step-Ahead letters allows you to cut, copy and paste text or images

using the clipboard. The clipboard is as an "invisible" temporary storage area that can hold any data that you *Copy* or *Cut* into it. The clipboard cannot be seen, it is simply utilised when you *Cut*, *Copy* or *Paste*.

Cutting Text From Your Letter



Select and highlight a portion of text and press the *CUT* button to remove the text from your document and place it in the clipboard. This text can then be "*Pasted*" back into the document (or another document) at a later stage.

Copying Text From Your Document



Select and highlight a portion of text and press the *COPY* button to copy the text into the clipboard. This text can then be "*Pasted*" back into the document (or another document) at a later stage.

Pasting Text Into Your Document

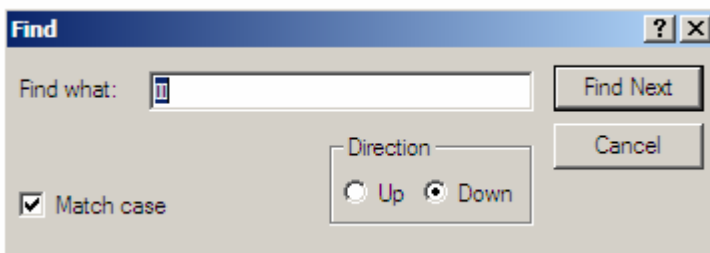
Place the cursor anywhere in your document and press the *PASTE button*



speed button to place the text from the clipboard into your document.

Finding specific words within text

Step-Ahead letters provides you with the facility to locate specific text within you written text. Select *Search* from the Edit Menu to display the following window :



Type the text you wish to find into the *Find What* text field.

Matching Case

Click on the *Match Case* check box to force the text search to match the case of your written text to the text you have just typed.

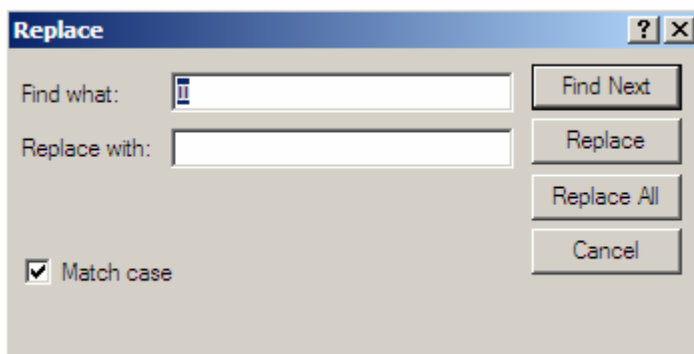
Choosing The Search Direction

Press the *UP* or *DOWN* radio button to force the search to look "*UP from*" or "*DOWN from*" your current cursor position.

Press the *FIND NEXT* button to actually perform the search. Upon finding a match the text window will move to the appropriate position within the document.

Replacing Specific Words Within Text

Select *Replace* from the Edit Menu to find and replace specific text within your document .This will display the following window :



Type the text you wish to find in the *Find What* text field. Type the text you wish to replace it with into the *Replace With* text field.


Matching Case

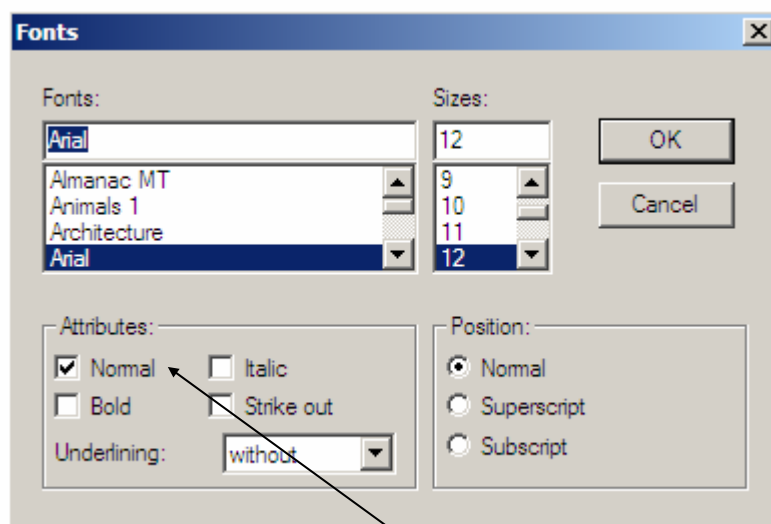
Clicking on the *Match Case* check box will force the search to match the case of your written text to the text you have just typed.

Press the *FIND NEXT* button to perform a search. Upon finding a match, the text window will move to the appropriate position within the document.

Press the *REPLACE* button to replace the currently highlighted text with the text you typed in the *Replace With* text field. Press the *REPLACE ALL* button to replace all occurrences of the currently highlighted text with the text you typed in the *Replace With* text field.

Changing Font Type

Select and highlight a portion of text and press the *FONT* button  to adjust size, font type or style of the highlighted text. You will see the following *Font* window :



Changing Font Size


To change the font size for any highlighted text select a size in the *Size* dropdown box.

Changing The Style Of The Text


Change the style of the highlighted text by clicking onto the *Attributes* radio box. You can change the appearance of your text by ticking *Normal*, *Italic*, *Bold*, *Strike-out*.

Bold, Italic And Underline

Text style can also be adjusted by pressing the *BOLD*, *ITALIC* or *UNDERLINE* speed buttons in the main operations area :

 - Bolds highlighted text.


 - Highlighted text changes to italics.


 - Underline highlighted text.

Left, Right, Centre And Justified Text

Text can be aligned to the left, right, the centre or evenly (justified). This is known as text "alignment" and can be performed by pressing the following speed buttons :

 - Aligns highlighted text to the left.

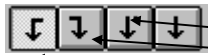
 - Aligns highlighted text to the right.

 - Aligns highlighted text to the centre.

 - Aligns highlighted text to be justified.

Left, Right And Centre Tabs

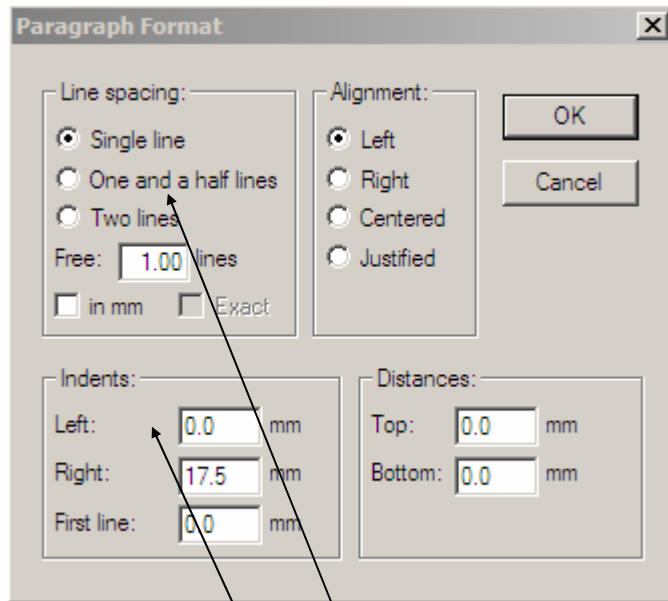
Tab settings are an easy way of creating "columns" in your text document. Text can be aligned to the left, right or centred within each column depending on the type of tab-setting you insert into your document.



To set a tab marker in your document first click on the desired *Left, Right* or *Centre TAB* speed button. Now *Double-Click* on the correct location on your ruler and the appropriate *Tab-Marker* will appear. Whenever the *Tab* key is pressed the cursor will move to this marker and any typed text will be of the selected alignment (left, right or centre).

Paragraph Formatting

Select *Paragraph* from the Format Menu to invoke the following *Formatting* window :



Changing The Line Spacing

Press either the *Single Line*, *One and a half lines* or *Two Lines* radio buttons to adjust the line gaps between highlighted text. Alternatively, you can customise the distance between lines by typing a value into the *Free* text field. You can change the scale of this by clicking the *In MM* check box on.

Changing Paragraph Indents

Indents refers to the "indentation distance" you wish to apply to a *Highlighted* block of text. You can modify the indentation from the left edge of your text, the right edge or just the indentation on the first line. To do so click onto the following :

Left:	<input type="text" value="0.0"/>	mm
Right:	<input type="text" value="0.0"/>	mm
First line:	<input type="text" value="0.0"/>	mm

- Click here and enter a value to adjust the left indentation.

- Click here and enter a value to adjust the right indentation.

- Click here and enter a value to adjust the left indentation of the first line of the highlighted text.

Modifying Paragraph Alignment

See the section **Left, right, centre and justified text.**

Line Distances

This section refers to distance between the top of the highlighted text and text above it, and the distance between the bottom of the highlighted text and text below it.

Select the *Top* text field and enter a value to modify the gap at the top of the highlighted text.

Select the *Bottom* text field and enter a value to modify the gap at the bottom of highlighted text.

Hiding / Showing Textual Control Characters



Press the *CONTROL CHARACTERS* speed button to show and hide control characters in the text area. Showing control characters can be useful when formatting letters with complex tab settings, or with spacing between blocks of text that are difficult to standardise.

Retrieving / editing a previously saved letter

Step-Ahead automatically organises saved letters according to the patient file that you currently have open. Retrieving saved letters is as simple as clicking on the *Letters / Select* Menu drop-down list. The letter you selected will immediately be retrieved and displayed in the text area.

Templates

Step-Ahead templates are one the most exciting new innovations in practice management today. Templates are primarily used for letter "*Preparation*". Templates are used for two reasons.

- To provide a standardised look and feel for repeatedly written letters.
- To "fill in" the commonly used fields in your letters. For example, a template could be used to fill in the *Name*, *Address* and *Phone* number of a patient every time you produce referral letter.

A template is, in itself, just a letter. However, it contains additional "*Database Fields*" which are utilised and filled in automatically by Step-Ahead.

Template fundamentals

There are two phases to creating a Step-Ahead template.

For The First Time (Once Per Template)

- Create a new template.
- Saving your new template.

Every Time You Need To Produce A Letter

- Open the appropriate patient file.
- Go to Step-Ahead letters.
- Open the appropriate template.
- Customise the letter (if required).
- Save the template as a letter.

Creating a new template

To create a new template select *NEW* from the *TEMPLATE* menu. This will open a new window and place the cursor in the top left hand corner of the text. You should now enter as much of the template text as you can. For example, when entering a referral template, you may start by typing the following:

- The practice letterhead

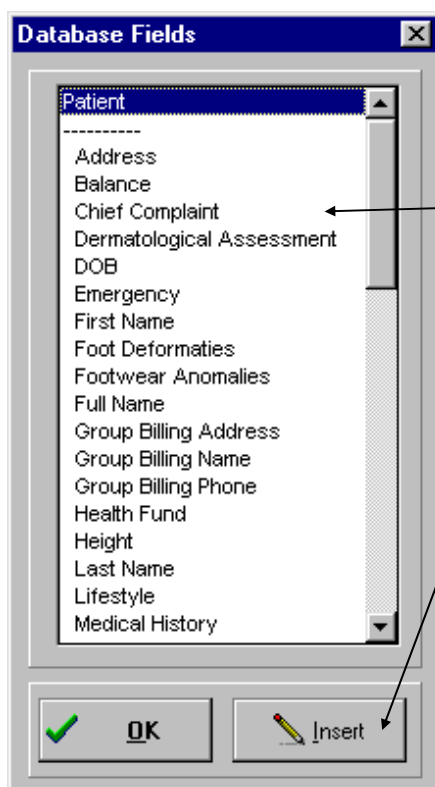
- The word "Dear"
- The words "Thank you for referring"
- The words "who presented with"
- The words "after successful treatment the excessive..." etc. etc.

Creating a *New Template* is very similar to creating a new letter, with one exception. The *INSERT DATABASE FIELDS* form is now available.

Inserting Database Fields Into A Template

Start at the top of the text you have Entered so far, and start reading your template. Find a point where it is necessary to enter *Database Information* and decide what type of *Database Field* you require. For example, you may require the *Patient Name* at the top left hand corner of your template. In such a case, make sure the cursor is in the correct position.

Now select *Patient Name* from the *DATABASE FIELDS* form and press the *INSERT* button to insert a direct reference to the appropriate *Database Field* stored within Step-Ahead. *Database Fields* can be anything from the *Patient Name* to their *Referring Specialist* or *Video Files*. The possibilities of letter writing are endless. Templates can be created to handle anything from the patient name and address on a simple letter, to sophisticated visual analysis reports containing full colour stills from their video file.



Double-Click on any of the desired *Database Fields* to insert it into your template. Alternatively, use the *UP* and *DOWN* arrow keys to highlight the desired database field and press the *INSERT* button to insert it. Press the *OK* button to finish inserting database fields and return.

Complete Database Field Listing

- Address
- Balance

- Chief Complaint
- Dermatological Assessment
- DOB
- Emergency
- First Name
- Foot Deformities
- Footwear Anomalies
- Full Name
- Group Billing Address
- Group Billing Name
- Group Billing Phone
- Health Fund
- Height
- Last Name
- Lifestyle
- Medical History
- Name
- Notes
- Occupation
- Orthopaedic History
- Other Comments
- Patient Type
- Patient ID
- Phone
- Phone Work
- Practitioner
- Radiographic Evaluation
- Referred By
- Shoe Size
- Somatotype
- Specialist Address
- Specialist Fax
- Specialist First Name
- Specialist Last Name
- Specialist Last Referral
- Specialist Referral Count
- Specialist Name
- Specialist Phone
- Specialist Title
- Specialty
- Sports History
- Today's Date
- Treatment to Date
- Video1

- Video2
- Video3
- Video4
- Video5
- Video6
- Video7
- Video8
- Video9
- Video Title
- Visual Gait
- Weight

NOTE

When adding *Database Fields* to a template, remember that the references you are making will be solely linked to the patient that is currently open.

What A Template Looks Like

Below is a sample template for a simple medical certificate :

Medical Certificate

Name: << First Name>> << Last Name>> << Today's Date>>

Address: << Address>>

Phone: << Phone>>

<< First Name>> has been diagnosed with excessive muscular problems within the lower leg. 4 days rest at home has been recommended.

Regards
<< Practitioner>>

Saving A Template

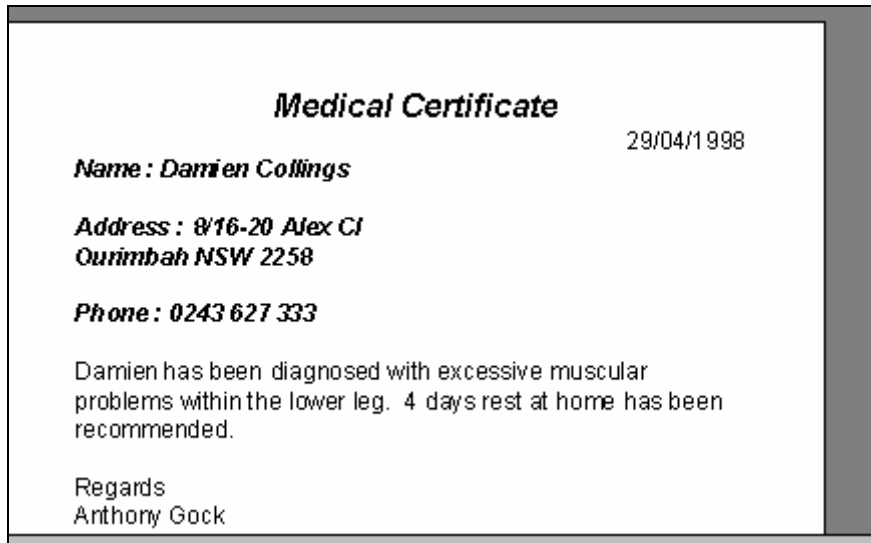
Once you completed your template press the **SAVE TEMPLATE** speed button .

Step-Ahead will then prompt you for a template filename (no more than 8 characters). Press the **OK** button or the **ENTER** key to actually save your template. You will notice the extension

".*.sat" is used to name a template. Your template is now available for every patient in Step-Ahead !!!

Using / filling templates to prepare a letter

To utilise a specific template first make sure you have opened the correct patient file. After entering Step-Ahead letters, simply select the desired template from the Templates Menu. Step-head will first load the template (as it was originally designed), and then sequentially insert any database information that the template refers to. For example, after loading the sample medical certificate (as discussed above) the resultant letter may look like the following:



Voila !!! A complete medical certificate without typing a single word !!!
You can continue adding to this letter should you need to do so. When you have finished press the **SAVE LETTER** button to store your letter.

Deleting a letter

To delete a letter step through the following :

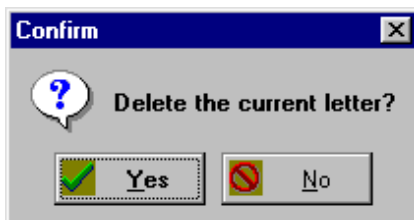
- Make sure the *EDIT TEMPLATE* button is *up*.



- Make sure you have loaded the letter from the *Files* drop-down list, and that the letter is visible in the text window.
- Be certain you wish to delete the letter.
- Press the *DELETE* speed button.



The following confirmation box will appear :



Press the *YES* button to delete the currently open letter. Press the *NO* button to cancel and continue.

Deleting a template

To delete a template step through the following :

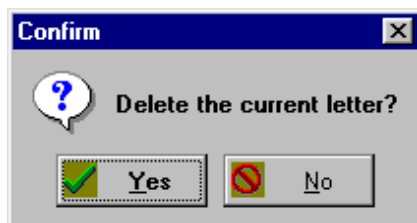
- Make sure the *EDIT TEMPLATE* button is *down*.



- Load the template from the *Files* drop-down list. The template will be shown at the design stage.
- Be certain you wish to delete the template.
- Press the *DELETE* speed button.



The following confirmation box will appear :



Press the *YES* button to delete the currently open template. Press the *NO* button to cancel and continue.

Performing a spell check

Performing a spell check in Step-Ahead letters is a very simple task. When you completed your



document press the *SPELL CHECK* button . This will automatically execute the spell check procedure starting from the top left hand corner of your letter. Upon finding an incorrectly spelled word you will be prompted to replace it.

The misspelled word appears in the *Not Found* text field. The closest matching replacement word appears underneath in the *Replace With* field. Below are explanations of the most useful choices available :



- Ignore the current spell error, and continue to the next mis-spelled word.



- Ignore all occurrences of the current spell error, and continue to the next misspelled word.



- Replace the current spell error with the text shown in the *Replace With* field.



- Replace all occurrences of the current spell error, and continue to the next misspelled word.



- Add the current text in the *Not Found* field to the custom dictionary. This text now becomes a valid word to be used in further spell checks.



- Cancel the current spell check procedure and return.

NOTE

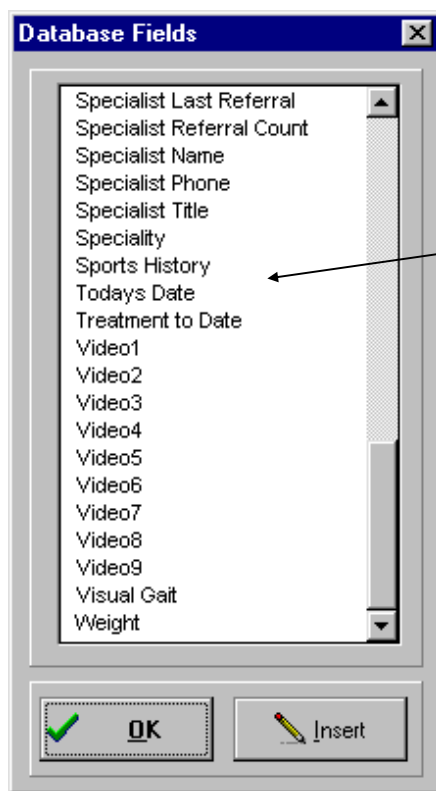
When a misspelled word is found you can quickly change the erroneous word by *Double-Clicking* on any suggestion in the *Suggestions* drop-down list. Additionally, contact Trim Systems for details on creating more than one custom dictionary.

Inserting a video analysis image into your letter

There are two ways to insert video analysis images into your letter:

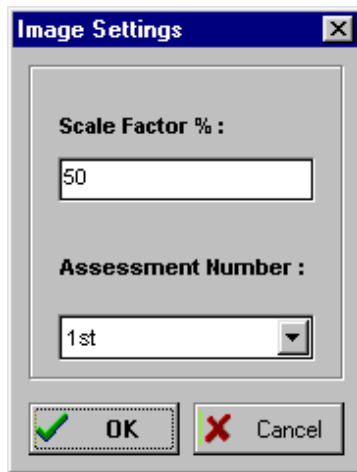
Using Templates To Insert A Video Image

When inserting database fields into templates you will notice there are nine video choices available.



Each option is linked to the patient's visual analysis database. "Video1" referring to the "Still 1". "Video2" referring to "Still2" etc. etc. To insert an image into a template just *Double-Click* on the desired item in the drop-down list.

Doing so will display the following image settings window :



From here you can customise both the size and assessment number the still will have when used in a template.

Type a value in the *Scale Factor* text field to set the size percentage the image will have when displayed. This can range from 10% through to %200. The default value is 50% of the image's original size.

Select an assessment number from the *Assessment Number* drop-down list. This may be a still from either the patient's first video assessment, their last video assessment or any assessment from two to nine. Press the *OK* button to finalise your settings and insert the video field into your template.

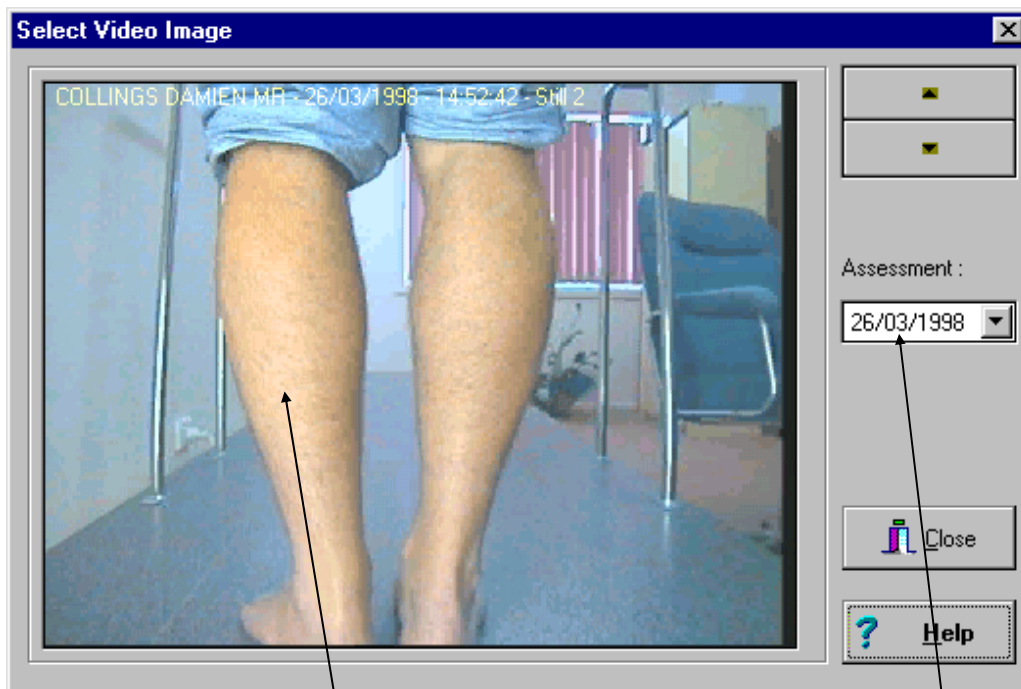
Inserting A Video Image Directly From Your Letter

There will be times when you wish to "browse" through a specific patient's video images and add them "ad-hoc" to your letter. When entering a letter, press the *INSERT VIDEO IMAGE* speed button:



Inserting an image this way is completely different to inserting an image via a template. You have the added ability to "browse" through the open patient's video images before they appear on the page. This method is intended for use when you are not sure exactly which images are to be used in the letter.

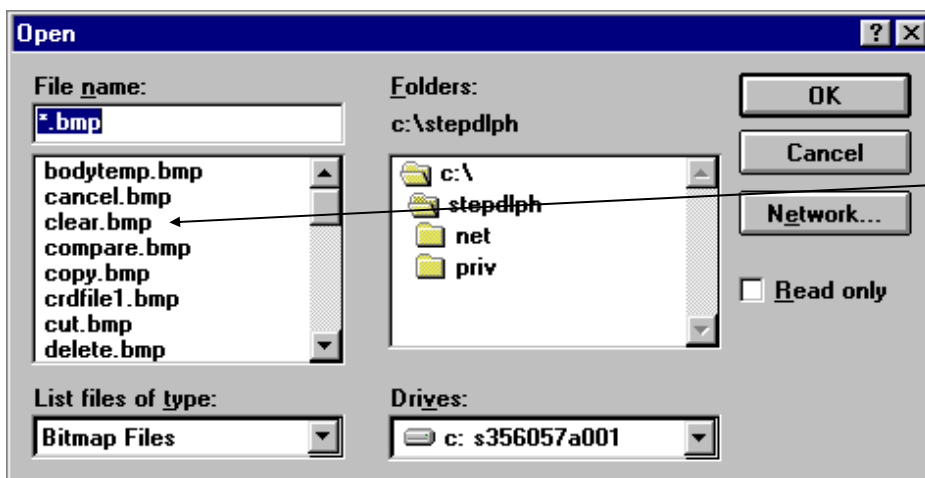
Pressing the above speed button will display the following window:



Step-Ahead will display the first recorded still in the first assessment for the currently open patient. This can be changed by clicking on the *UP* and *DOWN* buttons located in the top right hand corner. Additionally the visible assessment can be changed by *Clicking* on the *Assessment* drop-down list and selecting another date. *Double-Click* directly onto the image to insert it into your letter. This process can be repeated as many times as needed.

Inserting images from an external source

Step-Ahead letters will also display standard windows images when needed. Such images must have been saved using the ".bmp" extension. To insert an image select *IMAGE* from the Insert Menu. You will be presented with the following :



Choose the image file you wish to insert and *Double-Click* to insert it into your document.

Images From The Clipboard

Alternatively, you can insert any image stored in the clipboard using the *PASTE* speed button (as discussed above). This makes it possible to use alternative sources to obtain your image and use that in your letter with minimum of fuss.

Changing the view size(print preview)

You can adjust the size of the visible text window by pressing the *PRINT PREVIEW* button.



This will toggle between 25%, 50%, 75% and 100% view modes.