Preparing “Patient Friendly” Documents at UNMH: Questions to Answer
Version 12/08/10

First key question:

- What problem am I hoping to solve with this document? (NOTE: The problem may be better solved in a different way, and a document or written materials may not solve, or even affect, the problem.)

Second key question:

- What do I want someone to DO, or be able to do, as a result of reading and understanding this document? How clear is this message?

Additional important questions:

- Who is the intended audience (primary, secondary and any others)? Please include REALS demographics (race, ethnicity, age, primary language (read/write), sex, sexual orientation/gender identity) and any other relevant characteristics, such as their particular health condition.

- What are the 3-5 most important pieces of information in this document?

- Which pieces of information in this document are “need to know” and which are “nice to know”?

- What is the document’s tone? Is the information written in conversational, “living room” language rather than medicalese, bureaucratese, etc.?

- Have you checked the reading level (this is not required)? If so, what method did you use? What score did you get?

- When will the readers receive this document? What background information are you assuming they will already have?

- Who will provide the readers with this document? What scripting do/will they use during that interaction? Or will they receive it in the mail with written instructions?

- Are there any key terms or concepts that cannot be removed or changed? If so, why are they unchangeable?
• Is the document’s visual appearance and layout reader-friendly and appealing to the intended audience?

• Do illustrations or graphics convey the intended message rather than just provide decoration or visual variety?

• Are illustrations or graphics inviting? Do they resonate with the intended audience? Do members of the intended audience see themselves in the illustrations?

• Does the reader readily see or feel: “this document is meant for me”?

• If another version of this document has already been used, what feedback have you gotten from its readers? What have been any strengths or weaknesses they have identified?

**Especially for patient education materials:**

• Is the intended audience obvious on the cover? Does the cover address reader concerns?

• Does the cover convey the primary message of the document?

• Is the title compelling? Is the cover photograph or illustration inviting and familiar to the audience?

• Does the cover avoid hard-to-read or unfamiliar words?

• What is this document’s focus (on the disease, or on the person?)?

• What is your plan for sustaining and updating the education provided by this document?

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