



# Guidelines for Writing Patient Education Material

**PREPARED BY: UHN PATIENT EDUCATION NETWORK**

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# The Process of Developing Patient Education Material

1. Establishing a planning group  
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2. Assess available materials  
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3. Identify your purpose and the patient population  
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4. Decide on the content  
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5. Write the first draft in plain language  
↓
6. Apply a clear design  
↓
7. Get feedback from the clinical team  
↓
8. Get feedback from patients and families  
↓
9. Get clinical approval  
↓
10. Produce the material  
↓
11. Distribute and use the material  
↓
12. Evaluate the material

Reference: Wizowski, L., Harper, T. Hutchings, T. (2006) Writing health information for patients and families. (2nd ed.). Hamilton Health Sciences.



# Planning Guide

Use these questions to help you plan a patient education project.

## Purpose

- What knowledge do you want patients to learn?
  - What specific attitudes or behaviour(s) are the materials designed to support or change?
  - How is this material different from existing materials?
  - How will this material benefit your practice or program?
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## Patient population

- Who is the target audience?
  - What characteristics are common to these patients?
  - What do these patients already know?
  - What and how will they receive the material?
  - Are patients and families available to evaluate materials?
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## Content

- Have you done a literature search?
- What theoretical framework guides the knowledge, attitude or behaviour change?
- Have patients identified this as a learning need?
- Have patients described what they want to learn?
- What are the 3 to 5 most important messages you want to convey?
- Have members of the interdisciplinary clinical team reviewed the information for accuracy? Does it reflect what they teach?
- Is the information written in plain language and is it presented with a clear design?
- Does the information support the Hospital's mission, vision, and values?

Reference: Wizowski, L., Harper, T. Hutchings, T. (2006) *Writing health information for patients and families*. (2nd ed.). Hamilton Health Sciences.



## Format

- Will the format be easy for patients to use? Durable?
  - How will this material be stored, displayed and distributed?
  - Will this material be easy to access?
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## Budget

- How many patients would need to use/have this material? What quantity is needed?
  - Have you identified the printing specifications? (number of pages, paper size, weight of paper, artwork, binding)
  - Do you have a quote for the printing costs?
  - Do you have approval for funding the initial and ongoing costs?
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## Support

- Do you have a working group to help develop the material?
- How will members of the interdisciplinary clinical team give their input?
- Do you have the support of the health care providers who will use this material?
- Have you consulted a Patient Education Specialist?
- Can you develop this material collaboratively with other organizations?



# Plain Language Tips

## What Is Plain Language?

Plain language is a way of organizing and presenting information to the intended audience in a way that is easy for them to read, understand and use.

- Define your audience so that you can give them information that they want and need to know;
  - Test your materials to ensure that your audience understands your message.
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## Make your written information easy to read:

- Cover only 3 to 5 points and organize information clearly.
  - Use short words and short sentences.
  - Use common words rather than technical jargon.
  - Use simple graphics and techniques, such as point form and bold type to highlight important points.
  - Give patients practical information.
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## Plain Language Tips

1. Use common words. If you need to use medical terms, explain them in simple words.
2. Use the active voice.
3. Use a positive tone wherever possible.
4. Write directly to your reader.
5. Use short words and short sentences.
6. Write instructions in the order that you want them to be followed.
7. List important points separate from the text.
8. Don't change verbs into nouns.
9. List items in the same grammatical form.
10. Test what you write with your patients.



## Clear Design Tips:

1. Choose left flush justification.
2. Choose type that is clear and easy to read (12 point minimum).
3. Pay attention to how the text looks on the page.
4. Use illustrations and graphics to help demonstrate a concept or part of the body.

(Note: The PEN graphic artist can assist you to develop custom graphics that follow patient education guidelines and standards and, are not subject to copyright law.)

## Plain Language in Practice

Here are examples of how to apply plain language techniques:

### 1. Use common words rather than technical jargon.

**Instead of:** Neuralgia which accompanies fractures of the fibula indicates the advisability of administering an analgesic.

**Use:** Giving pain relievers to patients with broken legs helps make them more comfortable.

### 2. Use the active voice.

**Instead of:** This medicine is to be taken before every meal.

**Use:** Take this medication before every meal.

### 3. Use a positive tone wherever possible.

**Instead of:** Do not fail to notify your family physician in case of illness.

**Use:** Notify your family doctor when you are sick.

**Note that there are times when a negative tone gives a clearer message.**

**Instead of:** This medicine is suitable for children over 12 years of age.

**Use:** Do not give this medicine to children under 12 years of age.

#### 4. Write directly to your reader.

Use the words you, I, we, us, to make your document more personal. Refer to your readers in the first person.

**Instead of:** Patients are asked to register at the reception desk before each appointment.

**Use:** Please register at reception before your appointment.

#### 5. Use short words and short sentences.

**Instead of:** Patients' responsibilities for home convalescence will be enumerated by the attending physician before departure from the clinic.

**Use:** Speak with your doctor before you leave the clinic. S/he will explain how to take good care of yourself when you get home.

#### 6. Write instructions in the order you want them to be followed.

**Instead of:** Before you leave the clinic, make an appointment for a follow-up visit at the reception desk.

**Use:** Make an appointment for a follow-up visit at the reception desk before you leave the clinic.

#### 7. List important points separate from the text.

**Instead of:** Feb. 7-8, 1997, Toronto, Living with Diabetes, Diabetes Association of Toronto, 201-573 King St. E, Toronto, ON M5A 4L3; tel: (416) 864-9911, FAX (416) 864-9916

**Use:**

Living with Diabetes

When: Feb. 7 – 8, 1997

Where: Toronto, Ontario

Tel: (416) 864-9911

Fax: (416) 864-9916

For more information contact:

Diabetes Association of Toronto

201 – 573 King Street E.

Toronto, Ontario M5A 4L3

## 8. Don't change verbs into nouns.

<b>Verbs</b>	<b>Nouns</b>
decide	decision
reimburse	reimbursement
examine	examination
inspect	inspection
pay	payment

**Instead of:** All decisions pertaining to the payment of medical claims that exceed \$500 are the prerogative of your insurance company.

**Use:** Your insurance company will decide if it will pay medical claims that are more than \$500.

## 9. List items in a parallel (the same grammatical) form.

**Instead of:**

Three healthy eating habits are:

1. Getting eight hours of sleep each night
2. You should eat three balanced meals every day
3. It is important to exercise regularly

**Use:**


Three healthy eating habits are:

1. Get 8 hours of sleep each night.
2. Eat 3 balanced meals every day.
3. Exercise regularly.

## 10. Test what you write with patients.

Have patients and family members read and comment on what you write. If you prepare educational materials that will be widely circulated, conduct a field test among people who represent your audience. Consult with people who know your audience better than you do (patients and families, for example). This process will tell you:

- If you audience wants to read your work.
- If they can read it.
- If they can make use of it.



If your draft does not pass the test, the results will give you valuable information on how to revise your work for your audience.

(Contact the Patient Education Specialist for a sample evaluation form that can be used to test your material.)

## Clear Design in Practice

Here are examples of how to apply clear design principles:

### **1. Choose left flush justification.**

Left justification is the format of this paragraph. The spaces between the words are all the same, and the reader can move from one line to the next with little or no problem.

### **Avoid justified margins**

This format makes straight margins on both sides of the page. It can be difficult to read because the spaces between words are not all the same. This creates holes in the paragraph.

### **2. Choose type that is clear and easy to read.**

**Avoid:** Italics, ALL CAPS BOLD, too much underlining, or a type that changes the normal look of letters. These make reading more difficult.

## QUESTIONS?

Please do not hesitate to contact a member of the Patient Education team to assist you!

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