Guidelines for the Development of Patient and Family Education Materials – 8/11

UVa Health system provides patient and families with appropriate, easy to use, culturally sensitive, and helpful health information. The goal of education is to enable patients and families to make informed decisions, develop self-care skills, recognize problems, know what to do in response, and get questions answered. The materials may be written or audiovisual and are distributed by the hospital and medical staff members based on and adapted for the patient’s assessed barriers to learning and special learning needs. For any questions, concerns or assistance please contact Patient & Family Education office at 924-5724 or cjw2s@virginia.edu

Development/revision of written materials
1. When a staff member is selecting, developing or revising patient education materials, he/she will complete the “Guidelines for Choosing or Developing of Print Health Information Materials” form.

2. Prior to introducing new materials the staff member check Micromedex Care Notes and other on-line sources to see if useful material is already available.

3. It is recommended that reading materials be at the sixth grade level (excluding technical words that must be included such as “Anesthesiologist”), focus on what the patient/family needs to know, and avoids medical jargon. See “Tips for Developing Patient Education Materials” below for more details.

4. The materials should be sent electronically to cjw2s@virginia.edu or paper versions can be sent to the Patient Education Office at Box 800566. They will be reviewed, categorized, provided an identifying number, and entered into the Repository for availability either singly or in bulk through a link to Printing & Copying Services website.

5. If Spanish translation is needed, the material will be assigned the same identifying number as the English with an “S” at the end. On the English version the information below will be added:

   (For Patients who do not speak English)  This information was interpreted by __________________

   [[]]Spanish Form _ _ _ _ _ S given

   Name or Cymac #

Spanish materials are available on the Language Assistance Services website: www.healthsystem.virginia.edu/intranet/language/

6. Notice will be sent to the staff person responsible for the materials to review educational materials every three years. The staff person will review, submit changes and sign off.

7. The Patient and Family Education Subcommittee of the Patient Care Committee provides oversight of materials recommended or developed and is charged to coordinate and standardize patient and family education across the Health System. It addresses issues that extend beyond the scope of a single professional discipline and beyond a single service or unit. For information about the Committee please contact the office.

Recommendations for Video, computer programs, etc. should be sent to the Patient and Family Education Office at Box 800566, email cjw2s@virginia.edu or call 924-5724. The Relaxation Channel, Patient Safety Channel, Healthwise, New Parent Loop and DVD on demand are monitored by the office.

9. Attached are three forms to help organize the development of materials.
**TIPS FOR DEVELOPING PATIENT EDUCATION MATERIALS**

Before You Start Writing:

*Note: the word patient is used in these tips but family, caregiver, significant other, or consumer can be substituted*

- Consider your purpose and goal for the educational materials. Do you want the patient to learn new information or be able to perform a new skill or change a behavior? Do you have a target population in mind or do you want to be flexible? Before developing new materials see what is already available.
- Consider your audience. Focus on your patient’s needs and concerns. Provide the information that you think your patient will need to know. Keep it simple and practical. Consider the possible barriers to learning and strengths of your patient population.
- Have a clear and organized approach. Start by listing the key points you want to make. Use headings or titles help the flow of ideas. Consider beginning the material with an introduction and ending with a conclusion. Organize instructions in a logical order using numbers to walk the patient through step-by-step.
- Gather your resources to make sure the content is factual and accurate. Be sure to have someone review the content, bias, and format.
- Use appropriate, words, and style for your reader and purpose. Write in a warm, personal, positive (“Do” rather than “Don’t”) conversational tone using the second person (“you” or “your child”) and active voice (“take your medicine every morning” instead of “medicine should be taken every morning”).
- Avoid past tense. Use present tense when defining, explaining, or instructing ("Clean the site with warm tap water.") Use the future tense when writing about things to be expected ("You will be asked to change into a hospital gown.")
- Use simple words, short sentences. Incorporate illustrations, graphs, charts only if they aid in clarity and readability. Use examples to clarify ideas. Use words consistently (medicine instead of pills and drugs and medications). Include a way patients can get more information – a phone number, website, etc.
- Use common terms as much as possible (“use instead of “utilize”) and define any technical or medical words. Avoid abbreviations and acronyms except when commonly understood. When specialized vocabulary is essential, a parenthetical definition or a glossary should be included as part of the text. (“Medicine that lowers swelling” instead of “anti-inflammatory”)
- Use a readability scale to adjust the material to the 6th-8th grade reading level.

**Formatting Guidelines**

- Type all documents using Microsoft Word on the UVa Patient and Family Education Template.
- Use headings or titles to organize blocks of information. If giving instructions provide in numbered lists.
- Use highlighting including boldface, or boxes to emphasize important aspects of your document by calling attention to them visually. Be consistent throughout the text.
- A font such as Times New Roman in 12 point is recommended for text. (This is 12 point type.) If you are writing for the elderly, use a larger type size. Do not mix more than two type styles.
- Avoid making lines of type too long or too short. People read best if there are “chunks” of information. Use left justification (this piece is left justified).
- Avoid words are those that have three or more syllables. Keep sentences short (approximately 9 to 10 sentences per 100 words). Use one idea per paragraph (no more than 10 lines per paragraph).
- Use white space in the margins and between sections to improve the readability. Consider having the materials with 25% white space.
- Avoid using all capital letters. ALL CAPITALS IS MORE DIFFICULT TO READ.
- Print on white, off-white or light yellow non-glare paper.
Guidelines for Choosing or Developing Print Health Information Materials

For Additional Information, contact Patient & Family Education at 924-5724

<table>
<thead>
<tr>
<th>Name</th>
<th>Department</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Date _____________________________

If commercial product: Publisher Name _____________________________ Date of publication

[ ] New material  OR [ ] Update  OR Replaces _____________________________

Check all that apply - -

Purpose: [ ] General Info  [ ] Preparation for Procedure  [ ] Diagnosis Related  [ ] Discharge Instructions  [ ] Other

To be used by: [ ] Single unit/Department _____  [ ] Inpatient  [ ] Ambulatory  [ ] Procedure  [ ] Health System

[ ] General Public  [ ] Other:

For use: [ ] Web only  [ ] Print & Web  [ ] Print Only  [ ] Other:

Intended Audience: [ ] General  [ ] ED  [ ] Med/Surg  [ ] Peds  [ ] Procedure  [ ] Psych  [ ] Women  [ ] Other:

Checklist for Assessment of Print Material.

<table>
<thead>
<tr>
<th>Exploration of other resources</th>
<th>Agree</th>
<th>Disagree</th>
<th>Reason for use if “Disagree”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Micromedex Care Notes not useful.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No other relevant Health System resources exist.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Readability Assessment</th>
<th>Agree</th>
<th>Disagree</th>
<th>Reason for use if “Disagree”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintains interest, attention and is engaging.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is organized and provides information to stimulate action by patient (meets purpose).</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical terms or acronyms are clarified. Laymen terms are used as much as possible.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reading level is grade 6 or below. Readability verified by use of Fry or Fleisch-Kincaid (not including necessary technical words).</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>One to two syllable words used when possible.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Style Assessment</th>
<th>Agree</th>
<th>Disagree</th>
<th>Reason for use if “Disagree”</th>
</tr>
</thead>
<tbody>
<tr>
<td>If used, illustrations and simple and support text.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If used, drawings of body parts are used in context with body landmarks.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Headings are to help main points stand out.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generally sentences are 10 words or less and paragraphs are short and simple (4-5 sentences).</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print font is 12-14 point or greater.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All UPPER CASE letters are not used.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White space minimizes concentration of text</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overall Assessment</th>
<th>Agree</th>
<th>Disagree</th>
<th>Reason for use if “Disagree”</th>
</tr>
</thead>
<tbody>
<tr>
<td>If needed, copyright permission received.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No commercial product or drug promoted.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copy has been reviewed, edited, and no typos or unapproved abbreviations exist.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Any references used are less than 5 yrs old</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[ ] Update _____________________________ Date of publication ________

FOR ADDITIONAL INFORMATION, CONTACT PATIENT & FAMILY EDUCATION AT 924-5724

PUBLISHER NAME _______________
Please answer these questions -

Is this material designed to:  
[ ] be used independently by a patient/family/consumer (Patient Information)  
[ ] be provided by a health care provider (Patient Education)

Will copies by needed:  
[ ] one at a time for self-printing  
[ ] available in bulk through Printing & Copying Services  
[ ] both one at a time and in bulk

Does the material need to be translated into Spanish:  
[ ] Yes  
[ ] No

Materials need to be reviewed every three years. What is the name of the person to contact for this review:  
Name _______________________________  Title/Practice Area ________________  Email ________________

Print options include. Please choose one.  
[ ] 8-1/2” x 11” full size  
[ ] 5-1/2” x 8-1/2” (with one fold)  
[ ] 3-2/3” x 8-1/2” (with two folds)  
[ ] 11” x 17” (with one fold)

Check category for indexing. Please Choose One:  
[ ] 01 = Cardiovascular  
[ ] 02 = Respiratory  
[ ] 03 = Gastrointestinal  
[ ] 04 = Neurological  
[ ] 05 = Musculoskeletal  
[ ] 06 = Genitourinary/Renal  
[ ] 07 = Endocrine  
[ ] 08 = Infectious/Immunologic/Integumentary  
[ ] 09 = Cancer  
[ ] 10 = OB/GYN (Women’s Health)  
[ ] 11 = Otolaryngology/Ophthalmology  
[ ] 12 = Pediatric  
[ ] 13 = Mental Health  
[ ] 14 = Perioperative/Procedure  
[ ] 15 = Other/General

Other Comments:

Submitted to Patient and Family Education Office at Box 800566 by _______________________________  Date ________________________________

--------------------------------------------------------------------------------------------------------------------------

Received by Patient and Family Education Office by __________________ Date __________________

Guidelines for action:  

<table>
<thead>
<tr>
<th>√</th>
<th>Guidelines for action:</th>
<th>Date/Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Assessment tool completed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>All “Disagree” answers addressed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Copy right approval Ok</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Edited and abbreviations Ok</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Need for Spanish Translation Addressed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fits Patient Information Template</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fits Patient Education Template</td>
<td></td>
</tr>
</tbody>
</table>

Number Assigned:  PE _______ (If Spanish – S)
Thank you for providing your thoughts and reactions to this patient education material. Your comments are important to us. Please read this material and answer the questions below. You may refer back to the material as often as you wish.

Title: __________________________________________________________

Is the material well organized? [ ] Yes  [ ] No – If no, what are the problems?

Is the purpose and material clearly written? [ ] Yes  [ ] No – If no, what are the problems?

Are the words easy to understand? [ ] Yes  [ ] No – If no, which words are confusing?

Is the length of the material and amount of information provided appropriate for a patient or family? [ ] Yes  [ ] No – If no, what are the problems?

Is the print large enough to read? [ ] Yes  [ ] No

What would you suggest we change about the material?
[ ] Make it more detailed
[ ] Make it less detailed
[ ] Include more pictures/graphs to illustrate _______________________________
[ ] Leave out _______________________________

Overall rating:
[ ] Good – I recommend this material. I find it very clear and informative.
[ ] Fair – The material is useful but would be better if changes were made
[ ] Poor – The material is not useful and should not be used for patients and families.

Other Comments: (feel free to use the back of the form)  Thank you for your thoughts.
Copyright Information

The copyright law of the United States (Title 17, United States Code), protects the authors of “original works of authorship” including literary, dramatic, musical, artistic, and certain other intellectual works. This protection is available to both published and unpublished works. Under certain conditions specified in the law, one copy may be made of copyrighted material if the use is “for private study, scholarship or research”. Multiple copies of copyright material are not allowed. When quoting, paraphrasing or referencing another’s work you are expected to give credit. In order to use copyright material in a publication you must obtain permission from the copyright holder and acknowledge the copyright holder at the end of the material. A sample letter is below. The sections in italics would be changed according to your use. See [http://www.copyright.gov](http://www.copyright.gov) for more information.

Date

Materials Permission Department
Acme Book Publisher Company
123 Acme Street
Acme VA 22900 - 1234

Dear Sir or Madam:

I would like permission to use a graph as below for use in a patient education brochure at our hospital: “Discharge Planning for Home Care”.

Title: The Home Care Book
ISBN 1-2345-6789-0
Author: Ina Home
Copyright: 2005 by Acme Book Publisher Company
Material to be used: Graph on Page 123A
Type of use: This graph will be used to illustrate the types of teaching that takes place in the hospital that is communicated to the home health nurse.
How it will be used: This brochure will be provided to all patients will be receiving home care by out agency to help patients understand and better utilize home health care. There is no cost to the patient/family.

There are two copies of this letter; one to return in the self-addressed envelope and one for your files. Please let me know what conditions, if any, apply to this use. Thank you for your assistance.

Sincerely,

Ima Nurse
Our Home Health Agency

Permission granted by: (Name/Signature) ____________________________________________________________
Date: __________________________ Conditions, if any: