

Improving your forms

1. Use a descriptive title—from the user’s point of view.
2. Write a brief introduction to the form that will help the user understand what the information is for and why you need it.
3. Use a question protocol to make sure that all of the questions on the form are necessary and useful:
 - a. List every question you ask.
 - b. Review the questions separately from the layout.
 - c. For every question you ask, find out who within your organization uses the answers to each question.
 - d. Find out what they use the question for. (or, What will you do with the answer? Do your questions trigger the need for some kind of follow-up? And if they do, do you?)
 - e. Find out if the answer is required.
 - f. Find out what happens if the question is required but a client fills it out any old way just to get finished.

www.uxmatters.com/mt/archives/2010/06/the-question-protocol-how-to-make-sure-every-form-field-is-necessary.php

4. Use the clearest possible language.
5. Use good design elements to organize your form.
 - a. Avoid charts when possible.
 - b. Avoid asking the user to skip around the page, move in more than one direction.
6. Test your form with real users, revise, and test again.

Sage Words

accessible · low literacy · multi-lingual · culturally sensitive · health communications

Tips for Oral Communications

1. Use an opening line/introduction.
2. Individualize the person:
 - a. Elicit some small detail in an opening conversation
 - b. Memorize one physical detail
 - c. Invent a technique of your own
3. Set an agenda.
 - a. First I'm going to...
 - b. Then I'm going to...
 - c. The reason I'm going to do this is because...
 - d. Is that okay with you
4. Offer explanations/set the context.
5. Acknowledge discomfort:
 - a. These things can be hard to talk about...
6. Try again: "Let me try that again..."
7. Re-phrase: "In other words..."
8. Normalize: I ask all my patients these questions...
9. Empathize: I know this is a difficult subject...

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Resources for Health Literacy

Beyond the Brochure: Alternative Approaches to Effective Health Communication: A Guidebook <http://www.cdc.gov/cancer/nbccedp/bccpdfs/amcbeyon.pdf>

To assist health educators and health communicators in conceiving and producing educational materials and activities that do not rely solely on the printed word. [80 p.]

Clear & Simple: Developing Effective Print Materials for Low-Literate Readers

<http://www.nci.nih.gov/cancerinformation/clearandsimple>

This guide outlines a process for developing publications for people with limited-literacy skills. The process was derived from communications, health education, and literacy research and practice. In addition, writers who have produced low-literacy materials contributed their expertise.

Developing Easy-to-Read Patient Education Materials

http://www.breasthealthga.org/Education_Program/health_literacy/KJFMLiteracy%20Slides.pdf (Breast Health Connection of Georgia) PDF of a slide presentation by Kara L. Jacobson and Felicia J. Morton of the Breast Health Connection of Georgia

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http://www.breasthealthga.org/Education_Program/health_literacy/KJFMLiteracy%20Slides.ppt

PowerPoint presentation

Developing Patient/Client Health Information

www.calgaryhealthregion.ca/yourhealth/guidelines/Forms/DevOnlineHealthMatFeb05.pdf

(Calgary Health Region, Canada). Includes literacy facts, deciding on content, design and copyright issues. [34 p.]

Developing Patient/Family Education Print Material

<http://www.cdha.nshealth.ca/patientinformation/developingPFEdMaterial.pdf>

(Capital Health, Nova Scotia, Canada) Developing Patient/Family Education Print Material was created to provide guidelines and a process to follow in the development of patient/family education print materials. [29 p.]

Guidelines for Developing Easy-to-Read Health Education Materials

http://www3.doh.wa.gov/here/howto/toolbox_detail.aspx?ID=8

(Washington State Department of Health) Included are references to resources and research in the fields of health promotion and patient education. These resources will provide more detailed, practical information, for example, how to conduct a focus group or specific design considerations for people with low reading skills.

Guidelines for Preparing Patient Education Handouts

http://www.ucdmc.ucdavis.edu/cne/health_education/guide.html

(University of California Davis, Center for Nursing Education) Purpose, development, design, readability, financing and evaluation.

Health Literacy Style Manual (Covering Kids & Families)

<http://www.coveringkidsandfamilies.org/resources/docs/stylemanual.pdf>

How to Create and Assess Print Materials

<http://www.hsph.harvard.edu/healthliteracy/materials.html>

(Harvard School of Public Health: Health Literacy Website) by Rima E. Rudd. National Center for the Study of Adult Learning and Literacy.

➔ “Low Health Literacy—you can’t tell by looking”

<http://www.ama-assn.org/ama/no-index/about-ama/8035.shtml>

(American Medical Association) Included as part of its Health Literacy Kits, the AMA Foundation has created informational and instructional videos with case studies. The 2001 video, "Low health literacy: You can't tell by looking," features actual physicians and office staff interacting with real patients challenged by low health literacy

Patient and Family Education Materials Development Kit

<http://www.cshcn.org/docs/MatDevKit05.doc> (Children's Hospital & Regional Medical Center, Seattle, WA). 48 p.

Patient Education

<http://www.u-write.com/> From U-Write.com. Handy tips section that covers illustrations, readability, design layout, effectiveness and costs of in-house production.

Patient Education Materials: An Author's Guide

<http://uuhsc.utah.edu/pated/authors/>

(University of Utah Health Sciences Center) Covers resources, copyright, referencing material, clear writing, literacy and readability testing.

➔ Plain and Simple (Iowa Department of Public Health, Health Literacy website.)

Provides a list of readability formulas and links for online readability testing.

http://www.idph.state.ia.us/health_literacy/readability.asp.

Simply Put: Tips for creating east-to-read print materials (CDC)

<http://www.cdc.gov/od/oc/simpput.pdf>

Writing Easy-to-Read Materials (Center for Medicare Education)

<http://www.ihconline.org/toolkits/HealthLiteracy/WritingEasyToReadMaterials.pdf>

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Other Resources

Forms

Caroline Jarrett and Gerry Gaffney Forms that Work

<http://www.formsthatwork.com/>

<http://www.formsthatwork.com/files/Articles/DesigningUsableForms.pdf>

<http://www.uxmatters.com/mt/archives/2010/06/the-question-protocol-how-to-make-sure-every-form-field-is-necessary.php>

“Writing Healthcare Forms that Patients Can Understand and Complete” Helen Osborne <http://www.healthliteracy.com/article.asp?PageID=3786>

Usability testing

Steve Krug Rocket Surgery Made Easy <http://www.sensible.com/www.usability.gov/index.html>

Consent forms

<http://www.cancer.gov/clinicaltrials/patientsafety/simplification-of-informed-consent-docs>

Plain Language Law

<http://www.plainlanguage.gov/index.cfm>

<http://www.gpo.gov/fdsys/pkg/PLAW-111publ274/pdf/PLAW-111publ274.pdf>

Doctor/Patient Communication

“Awkward Moments in Patient-Physician Communication about HIV Risk,” Epstein et. al. *Annals of Internal Medicine*, March 15, 1998, Volume 128, Number 6.