



Health Literacy Checklist: Evaluating Patient Documents

This sample checklist of health literacy principles may be used when creating or evaluating documents, such as patient healthcare instructions, information, or written permissions.

Document title: _____	Main topic: _____
-----------------------	-------------------

Document format:	Preoperative instructions	Consent form	Discharge form
	Medication form	Other:	
Target audience: _____	Testing date: _____		
Completion deadline: _____	Revision date: _____		
Reviewed by: _____	Date last reviewed: _____		
Approved by: _____	Approval date: _____		

Document Suitability

Assessment tools (e.g., SAM, PEMAT) can be used to evaluate overall suitability.*

Does the material...

List one to two simple key objectives?	Yes	No	Sometimes
Comments:			

Describe the most important information first (e.g., what actions to take and their importance)?	Yes	No	Sometimes
Comments:			

Emphasize desired behaviors?	Yes	No	Sometimes
Comments:			

*Plain Language Grade Level, Relevance, Interest, and Design at http://en.copian.ca/library/learning/cpha/easy_does_it/easy_does_it.pdf; CDC Clear Communication Index at <http://www.cdc.gov/ccindex/>; Suitability of Assessment Materials (SAM) at <http://aspiruslibrary.org/literacy/SAM.pdf>; or Patient Education Materials Assessment Tool (PEMAT) at <http://www.ahrq.gov/professionals/prevention-chronic-care/improve/self-mgmt/pemat/index.html>

*Simple Measure of Gobbledygook (SMOG) at <http://www.readabilityformulas.com/smog-readability-formula.php>; Fry Readability Graph at <http://www.readabilityformulas.com/fry-graph-readability-formula.php>; the Flesch-Kincaid readability checker available in Microsoft Word.

Document Content:

Content should be written at a grade 4 to 6 level, which can be evaluated using readability calculators such as SMOG.†

Does the material...

Avoid medical jargon, technical or scientific language, and unnecessary abbreviations and acronyms?

Comments: Yes No Sometimes

Use plain language and words with one or two syllables?

Comments: Yes No Sometimes

Use brief sentences (no more than 10 to 15 words)?

Comments: Yes No Sometimes

Limit paragraphs to three to five sentences?

Comments: Yes No Sometimes

Use the word “must” to indicate requirements?

Comments: Yes No Sometimes

Use active voice? For example, “This blood test will tell us...”

Comments: Yes No Sometimes

Use audience-appropriate images and diagrams to highlight key messages?

Comments: Yes No Sometimes

Document Format:**Does the material...**

Keep the design simple, with a sharp contrast between text and paper?

Comments: Yes No Sometimes

Use appropriate space between lines of text (e.g., 1.2 to 1.5 line spacing)?

Comments: Yes No Sometimes

Leave ample white space, including at least one-half inch of white space around the margins and between columns?

Comments: Yes No Sometimes

Leave right margins jagged?

Comments: Yes No Sometimes

Use font sizes between 12 and 14 points and avoid italics?

Comments: Yes No Sometimes

Use a simple, clear font style, such as a sans serif font?

Comments: Yes No Sometimes

Create short lists (i.e., three to seven items) with bullets and no commas?

Comments: Yes No Sometimes

Reader Testing:

Will this material be tested by patients or members of the target audience?

Yes No (explain): Date tested: _____

Feedback:

Has feedback been incorporated into the editing and review process?

Yes No (explain): _____

Modified from: State of California Health and Human Services Agency Department of Health Care Services. Readability and Suitability of Written Health Education Materials. DHCS. <https://www.dhcs.ca.gov/formsandpubs/Documents/MMCDAPLsandPolicyLetters/APL2018/APL18-016B.pdf>. Updated July 2018. Accessed April 27, 2016.

The author gratefully acknowledges the contribution of Susan Cosgrove, MPA, CPHQ, project manager, team leader of Health Literacy Initiatives at the Health Care Improvement Foundation, to the development of this health literacy tool.

For more information, visit patientsafety.pa.gov
This checklist accompanies
Gardner LA. Health Literacy and Patient Safety Events. *Pa Patient Saf Advis.* 2016;13(2):58-65.
Available from patientsafety.pa.gov/ADVISORIES/Pages/201606_58.aspx