Quick Checklist for Plain Language

Center for Health Literacy | MAXIMUS and McGee & Evers Consulting, Inc.

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This checklist will help you see if print and web materials are written in plain language and formatted in ways that help readers find and understand key messages. Check each item below that is present in the material. The more items with checks, the more likely it will be that readers can understand and use the material.

Reader focus

- [ ] The title and introduction tell what the material is about, whom it is for, and how to use it.
- [ ] The tone is direct, friendly, and positive, using personal pronouns such as "you" and "we."
- [ ] The content is limited to what readers need to know, and anticipates their questions and concerns.

Organization

- [ ] The material begins with the most important message.
- [ ] The content is arranged in an order that makes sense to readers.
- [ ] Informative headings signal what's coming and make it easy for readers to skim.

Writing

- [ ] The writing is mostly in the active voice.
- [ ] The words are common and familiar to the intended readers.
- [ ] Acronyms, abbreviations, technical terms, and legal terms are used *only* if readers need to know them. If used, they are explained.
- [ ] Paragraphs are one topic and brief, with simple and straightforward sentences.
- [ ] Key terms are used consistently.
- [ ] Instructions are brief, step-by-step, and placed right where readers need them.
- [ ] The writing is cohesive — making connections among ideas to help readers understand and absorb new information.

Design and formatting

- [ ] The material has similar style and structure throughout, with consistent use of fonts, italics, bold print, color, numbers, and bullets.
- [ ] The material *looks* inviting and easy to read, with an uncluttered layout, plenty of white space, and dark colored type on a light background.
- [ ] The fonts are clean in their design and easy to read (not fancy or unusual).
- [ ] The text size is large enough for easy reading and each line has about 10 to 15 words.
- [ ] Italics and bold print are used sparingly.
- [ ] Images are clear and uncluttered, related to the content, and culturally appropriate for the readers.

Tips for checking the language

- [ ] *Take a careful look at the vocabulary.* Identify words you think readers would be unlikely to use in their everyday speech. Whenever possible, replace these words with others that would be easier and more familiar.
- [ ] *Read it aloud or have someone read it to you.* You will hear if the tone is too formal, the wording is awkward, the sentences are too long, or the paragraphs too dense.

More tips

What about using readability formulas?

You might think from the name that readability formulas measure reading ease or comprehension, but they do not. They count syllables, words, and sentences to calculate a grade level score, and ignore everything else.

If the grade level score is high, it means the material is too difficult for most readers. However, a low score does not mean the material will be easy for readers to understand and use. That's because short words and sentences are only one of many things that help readers understand the material.

Formulas cannot measure whether the purpose is clear, the words are familiar, or the explanations make sense. They don't address whether the main points are easy to find or the formatting guides the reader. They can't see if the text is too small or the page is too crowded.

Because readability formulas ignore most of the factors that facilitate comprehension, grade level scores cannot accurately assess whether the material is easy to read and understand.

What about field testing?

Field testing is the best and most direct way to tell if materials are easy to understand and use. Show them to people who represent the readers, and watch your test participants while they read. If you're testing informational materials, ask them to tell you about the content in their own words. If you're testing instructional materials, ask them to do the tasks, or (if that's not practical) ask them to tell you what they would do.

You will learn whether they can read and understand the materials, and how long it takes. You can find out if they think the materials are useful and appealing, and whether they can easily follow instructions and recognize important messages. You'll see if they get confused or frustrated, and you'll know where to make improvements.

Authors and resources

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The Health Literacy Style Manual
Translation: A Must-Have Guide
Five Guidelines for Developing Customer-Friendly Websites
To see these manuals in PDF, go to maximus.com/chl.

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Toolkit for Making Written Material Clear and Effective. Jeanne McGee, for the Centers for Medicare & Medicaid Services (CMS). www.cms.gov/WrittenMaterialsToolkit

This 11-part toolkit includes a step-by-step guide to field testing. Search for *Toolkit Part 6*.