

# Guidelines for the Development of Patient Education Materials

March 2004



Patients and families will be provided with appropriate, comprehensive, easy to use, and helpful information resources. The materials are to have interdisciplinary and health district input, a standard format, and be culturally sensitive.

When used effectively, print materials can help health care professionals maximize limited teaching time and enable patients to better manage their health. It is important to remember that print materials are only a guide and backup for accomplishing an overall educational plan.

**Guidelines for the Development of Patient Education Materials** was created to provide guidelines and a process to follow in the development of cancer Guidelines for the Development of Patient Education Materials.

All print materials approved for clinical accuracy by the appropriate site team and the Nova Scotia Cancer Patient Education Committee (NSCPEC) and prepared by a graphic designer will be placed on the websites of *Cancer Care Nova Scotia* and the districts (if possible).

All existing materials developed within the last three years at the Cape Breton Cancer Centre and Capital Health will be “grand-fathered” until they are due to be reviewed.

If you have suggestions to improve this document or would like to receive a copy, please contact the  
Chair of the Nova Scotia Cancer Patient Education Committee.

This document will be evaluated and adjusted in February 2007.

**Adapted from:**

Developing & Revising Guidelines for the Development of Patient Education Materials  
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Approved by: Nova Scotia Cancer Patient Education Committee  
February 2004

# Guidelines for the Development of Patient Education Materials

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# Introduction

## Writing Quality Guidelines for the Development of Patient Education Materials

Print materials can be valuable tools for patient education, but they are only supplements and never a substitute for verbal communication. When used effectively, print materials enable patients to manage their health better and can also help health care professionals maximize limited teaching time. Print materials can convey basic repetitive information freeing the health professional to concentrate on individualized follow-up instruction. They can also provide consistency in teaching.

Limited literacy is a widespread but often hidden problem. A survey in 1990 by Statistics Canada found 38% of Canadians had some degree of difficulty carrying out everyday reading tests. One study reports that those with the lowest literacy also had the poorest health status. These facts must be given consideration when we evaluate and prepare print material for our patients and their families. It should be noted that most people read at least two grade levels below their last school grade completed, so relying on the length of formal education as an assessment parameter is a serious limitation. A great deal of available patient and family education material is highly technical, being written at the high school or university level, and as a result often fails to accomplish the goal of the developer.

A readability formula should be used to predict the level of reading skills needed to read a piece of material. These skills are expressed as a grade level and we must target the grade level of our Guidelines for the Development of Patient Education Materials at grade six. A formula is a quick guide but it only provides a rough estimate of readability and is not a substitute for common sense. Computer software programs are available to assist us but they also only provide an estimate of readability.

A low grade reading level is only one of many elements that makes a piece of material easily understood. If our patients are to benefit from printed health information, they must be written clearly and concisely. Clear writing includes logical organization and familiar language, which sounds like every-day speech. Other topics to be considered when preparing and evaluating the readability of material is the overall appearance, sentence length and tone.

It is imperative that health care professionals develop creative, innovative and comprehensive cancer patient and family education materials.

# Developing Print Materials

## Getting Started

- Develop a work-group and appoint a leader.
- Contact the individual responsible for patient education in your district. Request assistance if available.
- Familiarize yourself with **Guidelines for the Development of Patient Education Materials**.
- Develop a plan following the criteria and procedure in **Guidelines for the Development of Patient Education Materials**.

# Developing Print Materials

## Criteria for Development

### 1. Group Developing Material

#### 1.1 Organization

- The opening paragraph should state the purpose of the pamphlet.
- Title reflects content.
- Question & Answer format is useful.
- Headings and subheadings are required.
- A glossary is important. It should be placed at the beginning rather than at the end of a document so the reader is more likely to find and use it.
- A table of contents is not needed if the pamphlet is less than eight pages. Do not count the title page.

#### 1.2 Style & Language

- Use a friendly tone.
- Promote patient taking an active role in his/her learning.
- Promote patient taking an active role in his/her health.
- Talk directly to the reader. Use the words: you, I, we, us and our to make material more personal. Do not refer to your reading audience as clients, patients or customers.
- Gender free language is to be used.
- Multicultural issue will be addressed.
- Place the subject and verb close to the beginning of the sentence.
- Eliminate all unnecessary words.
- Be consistent with wording.
- Use one or two syllable words as much as possible.
- Maintain average sentence length of ten words.
- Paragraphs should be limited to four or five sentences.
- List information whenever possible.

#### 1.3 Illustrations

- Use only illustrations that do not have copyright or obtain written permission to use from owner. Submit written copyright permission with draft of text to *Cancer Care Nova Scotia (CCNS)*.
- Simple line drawings are best.
- When using line drawings of anatomy, include body landmarks.
- Illustrations are to be up-to-date.
- Label diagrams with familiar words.
- Try to include pictures that represent various ethnic groups, both men and women equally and avoid stereotypical occupational roles.
- To prevent patients from mistaking a "Do Not" drawing for a "Do", use the familiar heavy slash through the diagram.
- Good graphics provide relief from dense text.

#### 1.4 Readability

- Unless it is necessary for the reader to learn medical words, there is no reason why simpler language should not be used.
- Define all medical terms.
- ***Target the reading level to grade six or below.***
- A readability formula is to be used. SMOG is a good choice (See page 18-20).
- The first time an acronym is used it should appear with the words it stands for.
- Dark type (navy or black) is to be used on white or cream background.
- Glossy paper is to be avoided.
- Do not use Roman numerals.
- Do not use abbreviations.
- Words are not to be hyphenated over two lines.
- Text should not be too dense.

#### 1.5 Other

- Be prepared to go through several drafts.
- Remember your readers' cultural, ethnic, economic and educational backgrounds.
- The text is to be original.

## **2.0 Layout and Printing**

### **2.1 Visual Appearance**

- DO NOT USE ALL UPPER CASE LETTERS.
- A standard layout is to be used.
- Do not use different typefaces on the same page.
- Print will not be less than 14 point in body text. In special circumstances 18 point may be used.
- Stone typeface is to be used.
- Use a justified left margin and a ragged right margin.
- Use generous amounts of white space (areas without print).
- Use wide margins and borders.
- Use bullets.
- Skip space between paragraphs and sections.
- Copy is to be clean and clear.
- Emphasize important information remembering that too much emphasis can be distracting.

### **2.2 Other**

- The developer (group or individual) is to be recorded on each pamphlet.
- The site team(s) that provides approval is to be identified on the pamphlet.
- The development or revision date is to be placed on each pamphlet.
- Pamphlet size will be 8½ x 11 inch.
- Page numbers are to be placed on the pamphlet if it is more than one folded page.
- The CCNS logo is to be placed on each pamphlet.
- Anyone who identifies that a pamphlet needs updating is to contact the original developer and then collaborate with this person/group to update the educational piece.



# Developing Print Material

## Check List for Developer Form1

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Evaluated by: \_\_\_\_\_

Did you follow Criteria for Development on pages 7-8 in **Guidelines for the Development of Patient Education Materials** when you developed this teaching aid? Yes ☐ No ☐

Clinical Assessment	Agree	Disagree
Information is current		
Information is accurate		
Information is sufficient for purpose		
<b>Educational Assessment</b>		
Maintains interest and attention		
Organization of information is appropriate		
Technical terms or acronyms are identified		
Reading level is grade six or below. If not, what grade?		
Is there any unnecessary information?		
<b>Technical Assessment</b>		
Illustrations are simple and easy to understand		
Illustrations promote the text		
Headings are used		
Main points stand out clearly		
Sentences are ten words or less		
Paragraphs are short and simple (4-5 sentences)		
Information is listed when possible		
Print is 14 point		
Upper case letters are not used		
White space minimizes concentration of text		
Dark type on white or light background		

<b>Affective Assessment</b>	<b>Agree</b>	<b>Disagree</b>
Overall appearance is appealing		
Tone is positive		
Stereotyping is avoided		
There is not any commercial product promotion		

Would this material be useful to a patient independently, or should its use be guided by a health care professional?

Independent Use \_\_\_\_\_ Guided Use \_\_\_\_\_

Was the draft evaluated by three patients?

Yes \_\_\_\_\_ No \_\_\_\_\_

Has the Approval Record Guidelines for the Development of Patient Education Materials (Form 3 page 25) been signed?

Yes \_\_\_\_\_ No \_\_\_\_\_

Comments:

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# Developing Print Materials

## Recommended Outlines

Please consider the topics listed on the left - under the Content heading to ensure that all of the important topics are included in the print material you are developing.

It is important to use headings and subheadings to divide your information into different topics. The column on the right provides potential titles for the various sections.

### 1. Diagnostic Tests / Procedures

Content	Headings/Subheadings
<ul style="list-style-type: none"> <li>Definition and purpose of test</li> </ul>	<ul style="list-style-type: none"> <li>What is a _____?</li> <li>Why is this test done?</li> </ul>
<ul style="list-style-type: none"> <li>General information about test Provide phone number for additional information</li> </ul>	<ul style="list-style-type: none"> <li>Who will do the test?</li> <li>Where will the test be done?</li> <li>How long will the test take?</li> </ul>
<ul style="list-style-type: none"> <li>Potential risks of test</li> </ul>	<ul style="list-style-type: none"> <li>Are there any risks with this test?</li> </ul>
<ul style="list-style-type: none"> <li>Preparation               <ul style="list-style-type: none"> <li>- day before test</li> <li>- parking</li> <li>- day of test</li> <li>- include information re medications</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>How do I get ready for the test?</li> <li>Where will I park?</li> </ul>
<ul style="list-style-type: none"> <li>Describe test</li> </ul>	<ul style="list-style-type: none"> <li>How is the test done?</li> </ul>
<ul style="list-style-type: none"> <li>Instructions after test</li> </ul>	<ul style="list-style-type: none"> <li>Care at home</li> <li>Call your doctor if you have:</li> <li>If your doctor is not available, go to the nearest Emergency Department</li> </ul>
<ul style="list-style-type: none"> <li>Follow-up care</li> </ul>	<ul style="list-style-type: none"> <li>Visit to your doctor/other health care professionals</li> </ul>

## 2.1 Surgery / Inpatients

Some organizations have generic booklets that thoroughly cover general preoperative care and the first few days after surgery, so this material may not need to be repeated for specific surgeries. Before starting, check to see what is in use in your area.

Content	Headings/Subheadings
<ul style="list-style-type: none"> <li>Brief introduction stating why surgery is being performed</li> </ul>	<ul style="list-style-type: none"> <li>Some reasons for _____ surgery</li> </ul>
<ul style="list-style-type: none"> <li>Anatomical explanation of surgery providing diagram</li> </ul>	<ul style="list-style-type: none"> <li>Your surgery</li> </ul>
<ul style="list-style-type: none"> <li>Before surgery</li> </ul>	<ul style="list-style-type: none"> <li>Getting ready</li> </ul>
<ul style="list-style-type: none"> <li>Special preparation</li> </ul>	<ul style="list-style-type: none"> <li>Just before surgery               <ul style="list-style-type: none"> <li>- Special tests</li> <li>- Special diet</li> <li>- Medications</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>Care during hospitalization</li> </ul>	<ul style="list-style-type: none"> <li>Your hospital stay</li> </ul>
<ul style="list-style-type: none"> <li>Care at home</li> </ul>	<ul style="list-style-type: none"> <li>At home OR</li> <li>Recovering at home OR</li> <li>Active and involved again OR</li> <li>When you go home               <ul style="list-style-type: none"> <li>- Care of incision</li> <li>- Activity/Sexual activity</li> <li>- Exercise/Sports</li> <li>- Healthy eating</li> <li>- Your medications</li> <li>- Supplies/Special equipment</li> <li>- Returning to work</li> <li>- Managing stress/Coping</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>Symptoms to report to physician</li> </ul>	<ul style="list-style-type: none"> <li>Call your doctor if you have:</li> </ul>
<ul style="list-style-type: none"> <li>Follow-up</li> </ul>	<ul style="list-style-type: none"> <li>Visit to your doctor/other health care professionals</li> <li>Additional treatments</li> </ul>
<ul style="list-style-type: none"> <li>Risk factors to be avoided</li> </ul>	<ul style="list-style-type: none"> <li>Staying healthy</li> </ul>
<ul style="list-style-type: none"> <li>Resources</li> </ul>	<ul style="list-style-type: none"> <li>Who can help me in the community?</li> </ul>

## 2.2 Day Surgery / Outpatient Procedure

Again, general topics may be covered in a booklet and do not need to be repeated.

Content	Headings/Subheadings
<ul style="list-style-type: none"><li>▪ Care at home</li></ul>	<ul style="list-style-type: none"><li>▪ Controlling discomfort</li><li>▪ Hygiene</li><li>▪ Activity/Sexual activity</li><li>▪ Care of your incision</li><li>▪ Other important points</li><li>▪ Call your doctor if you have:</li></ul>

### 3. Medical Condition

Content	Headings/Subheadings
<ul style="list-style-type: none"> <li>Briefly describe condition</li> </ul>	<ul style="list-style-type: none"> <li>What is _____?</li> <li>What causes _____?</li> <li>Is it inherited?</li> </ul>
<ul style="list-style-type: none"> <li>Symptoms of condition</li> </ul>	<ul style="list-style-type: none"> <li>What are the symptoms of _____?</li> <li>How is _____ diagnosed?</li> </ul>
<ul style="list-style-type: none"> <li>Recovery in-hospital</li> <li>Side effects and risks of medications</li> </ul>	<ul style="list-style-type: none"> <li>How is _____ treated? Treatment: Lifestyle / Staying healthy What can I do to help myself?               <ul style="list-style-type: none"> <li>Stop smoking</li> <li>Activity</li> <li>Healthy eating</li> <li>Managing stress</li> </ul> </li> <li>Your medications</li> </ul>
<ul style="list-style-type: none"> <li>Care at home</li> </ul>	<ul style="list-style-type: none"> <li>At home OR</li> <li>Recovering at home Lifestyle               <ul style="list-style-type: none"> <li>Activity/Sexual activity</li> <li>Exercise/Sports</li> <li>Healthy eating</li> </ul> </li> <li>Your medications</li> <li>Supplies/Special equipment</li> <li>Returning to work</li> <li>Managing stress/Coping</li> </ul>
<ul style="list-style-type: none"> <li>Symptoms to report to physician</li> </ul>	<ul style="list-style-type: none"> <li>Call your doctor if you have:</li> </ul>
<ul style="list-style-type: none"> <li>Follow-up care</li> </ul>	<ul style="list-style-type: none"> <li>Visit to your doctor/other health care professionals</li> <li>Additional treatments</li> </ul>
<ul style="list-style-type: none"> <li>Resources</li> </ul>	<ul style="list-style-type: none"> <li>Who can help me in the community?</li> </ul>
<ul style="list-style-type: none"> <li>In many conditions it is not necessary to do recovery in-hospital and care at home separately.</li> </ul>	

#### 4. Health Promotion

Content	Headings/Subheadings
<ul style="list-style-type: none"><li>▪ Changes in lifestyle required to reduce risk factors</li></ul>	<ul style="list-style-type: none"><li>▪ Preventing _____ OR</li><li>▪ Making some changes OR</li><li>▪ Controlling risk factors OR</li><li>▪ What can I do to feel better? OR</li><li>▪ Staying healthy</li></ul>
<ul style="list-style-type: none"><li>▪ Resources</li></ul>	<ul style="list-style-type: none"><li>▪ Who can help me in the community?</li><li>▪ To find out about support groups in your area, call _____</li></ul>

## Developing Print Materials

### SMOG Readability Formula

Our patients and their families must be able to read and understand our printed instructions. We must remember that many individuals read at least two grade levels below their last school grade completed (London, 1999, p189). A readability formula enables us to take a rough measure of the reading level of material but it is not a substitute for common sense as there are other considerations when preparing material. The fact that an item is written at a low grade reading level does not mean that it is clear and well written. ***Target the reading level for grade six or below.*** SMOG is only one of many formulas that can be used.

Adapted from McLaughlin, G. (1969), SMOG grading: A new readability formula. Journal of Reading, 12 (8) 639-646.

The SMOG conversion tables were developed by Harold C. McGraw, Office of Educational Research, Baltimore Co. Public Schools, Towson, MD.

#### **SMOG for Text Containing More Than 30 Sentences:**

1. Choose 10 consecutive sentences from near the beginning, middle and end of your text. Skip titles and headings.
2. In the sample of 30 sentences, count all words that have 3 or more syllables. Include repetitions of the same word, no matter how often it is used.
3. Find the nearest square root of this total.
4. Add 3 to the square root to find the reading level that a person must have reached to understand the text.



### **SMOG for Text Containing Under 30 Sentences:**

1. Count the number of sentences in your pamphlet.
2. Use the Conversion Table to get the conversion number that corresponds to the number of sentences in your instructions.

**Conversion Table**

<b>Number of Sentences In Selection</b>	<b>Conversion Number</b>
29	1.03
28	1.07
27	1.10
26	1.15
25	1.20
24	1.25
23	1.30
22	1.36
21	1.43
20	1.50
19	1.58
18	1.67
17	1.76
16	1.87
15	2.00
14	2.14
13	2.30
12	2.50
11	2.70
10	3.00

2. Count the words that have 3 or more syllables.
3. Multiply your 3-syllable word count by the conversion number to get an adjusted word count.
4. Refer to SMOG Table on page 20 to find the grade level.

### SMOG Table

Adjusted Word Count (three-syllable words only)	Grade Level
0 - 2	4
3 - 6	5
7 - 12	6
13 - 20	7
21 - 30	8
31 - 42	9
43 - 56	10
57 - 72	11
73 - 90	12
91 - 110	13
111 - 132	14
133 - 156	15
157 - 182	16
183 - 210	17
211 - 240	18

#### Additional Guidelines:

- Hyphenated words are considered one word.
- Numbers that are in numeric form should be pronounced to determine the number of syllables.
- Abbreviations should be read as unabbreviated to determine the number of syllables.
- If a sentence contains a colon, avoid using that sentence in your count, OR count it as two sentences.
- Do not count verbs ending in "ed" or "es" that give the word a third syllable.

#### To access Flesch-Kincaid reading level information in Microsoft Word:

- click "Tools" on your standard toolbar
- click "Spelling and Grammar"
- click "Options"
- under "Grammar" in the options box, check off "Show readability statistics"
- click "OK"

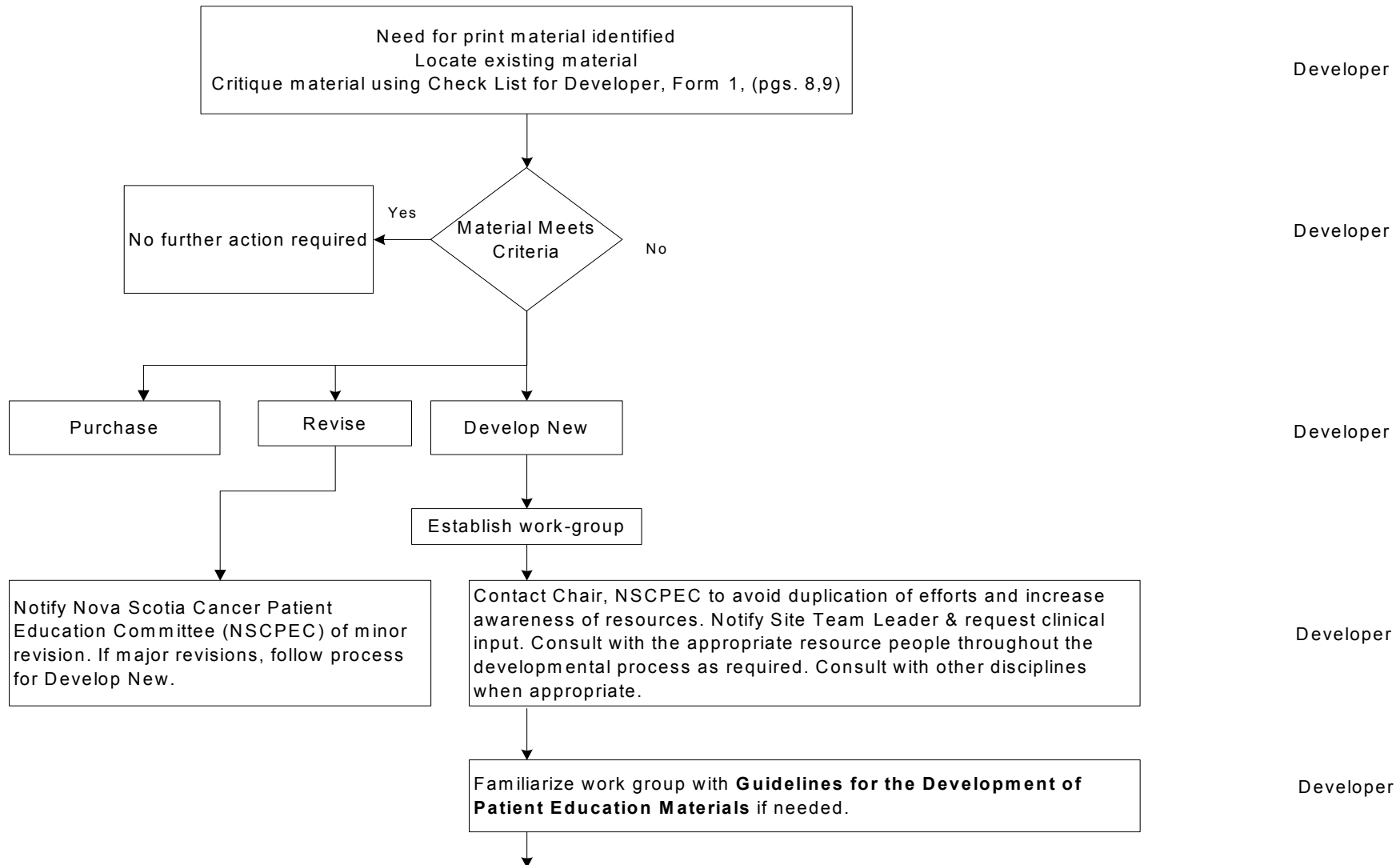
Click on "Tools" in the Menu Bar and then select "Spelling and Grammar". When the grammar check is completed you will be provided with "Readability Statistics".

**Davis, Meldrum, Tippy, Weiss & Williams (1996, p. 114) make a very important point when they write that studies indicate even highly educated adults are not insulted by health material written in simplified language.**

## Development, Revision & Approval Procedure

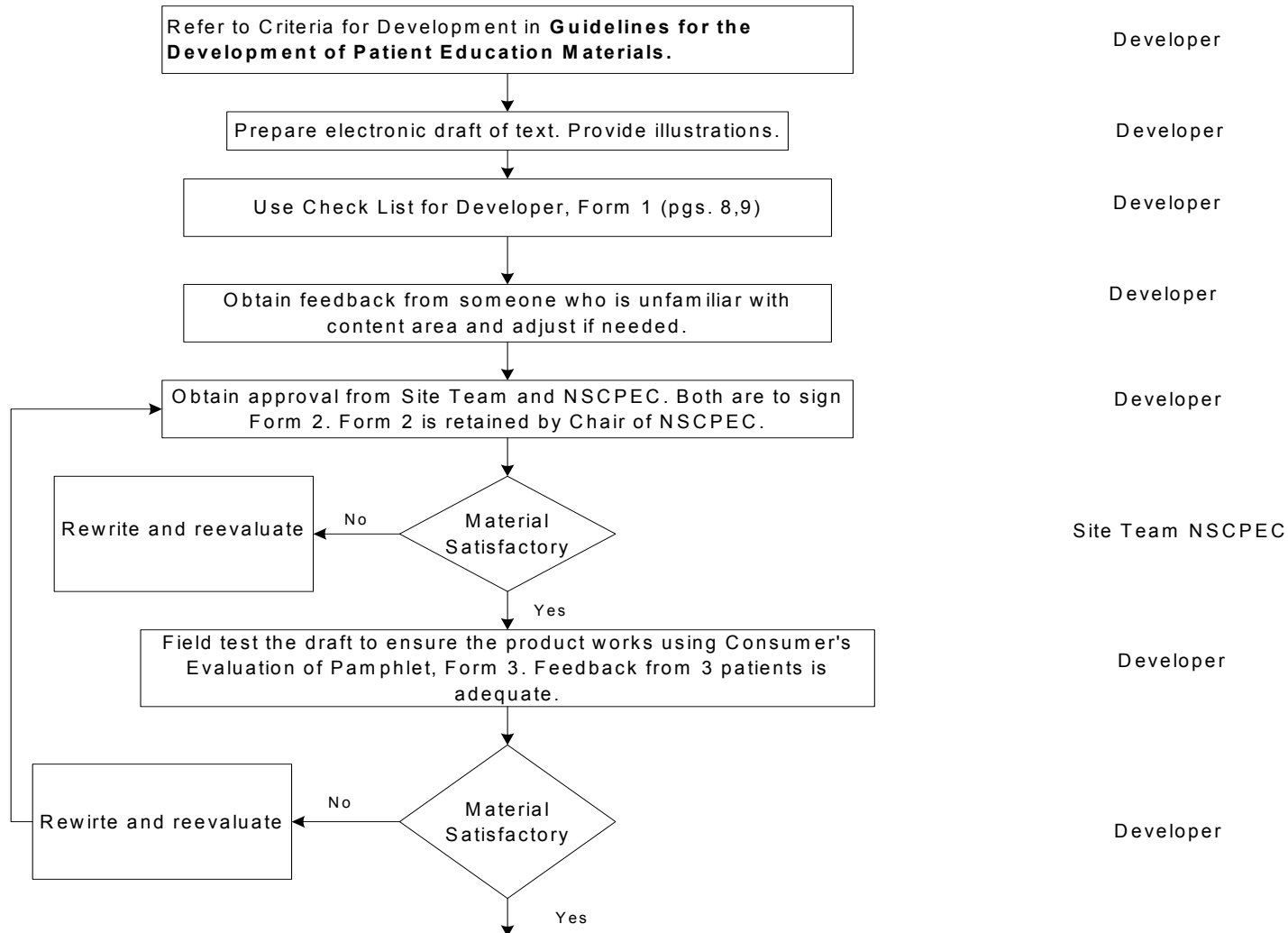
### Process

### Who is Responsible?



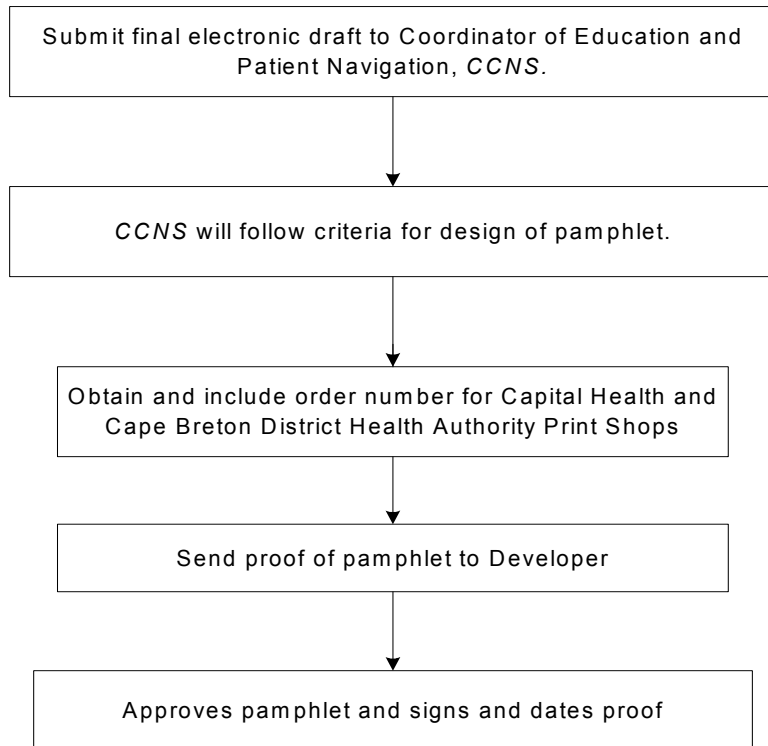
## Development, Revision & Approval Procedure Process

## Who is Responsible ?



## Development, Revision & Approval Procedure

### Process



### Who is Responsible?

Developer

CCNS  
Communications  
Assistant

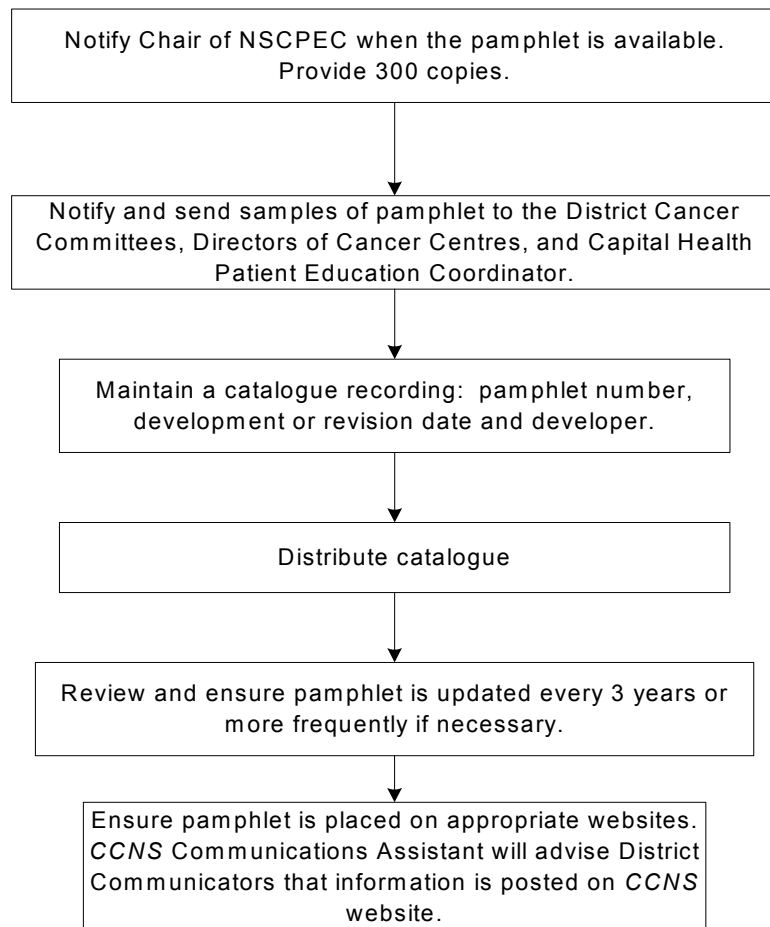
CCNS  
Communications  
Assistant

CCNS  
Communications  
Assistant

Developer

## Development, Revision & Approval Procedure

### Process



### Who is Responsible?

CCNS Communications  
Assistant

Chair NSCPEC

Patient Education  
Coordinator / Capital  
Health

CCNS

Patient Education  
Coordinator / Capital  
Health

Capital Health, Patient Education  
Coordinator  
CCNS Communications Assistant

# Guidelines for the Development of Patient Education Materials

Form 2

## Approval Record

for inhouse printing and Internet

Title	Print Shop order #

I approve the patient education pamphlet(s) listed above to be provided in hard copy and placed on the Internet. The entire text and illustrations are original.

**Approved by:**

**Site Team Leader or Delegate**

for Content

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print name

Date: \_\_\_\_\_

**Chair**

**Nova Scotia Cancer Patient Education Committee**

for Patient Education Standards

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

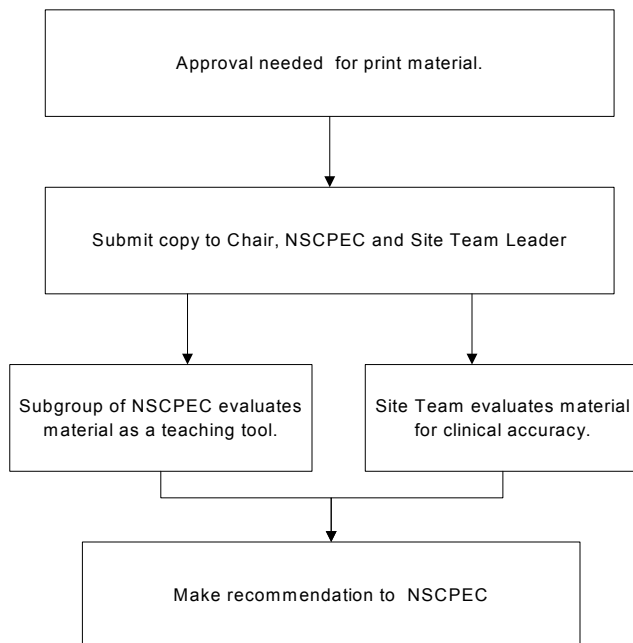
February 2004

# Approval of Materials Developed by Other Organizations and Industry

All materials developed by the Canadian Cancer Society, Canadian Association of Nurses in Oncology (CANO) and Canadian Association of Psychosocial Oncology (CAPO) are automatically approved for use by cancer patients in Nova Scotia.

Teaching materials developed by all other groups are to be reviewed by a Site Team and the Nova Scotia Cancer Patient Education Committee (NSCPEC).

Materials in use on January 1, 2004 will be “grandfathered”.





# Consumer's Evaluation of Pamphlet

Form 3

**Title of Pamphlet** \_\_\_\_\_

Please help us to make this pamphlet better by taking a few minutes to answer these questions.

1. Was the pamphlet easy to read?

Yes ☐ No ☐

2. Were the drawings helpful?

Yes ☐ No ☐

3. Would more drawings be helpful?

Yes ☐ Please specify \_\_\_\_\_ No ☐

4. What did you learn from the pamphlet?

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5. Was there any unnecessary information in the pamphlet?

Yes ☐ No ☐

(over)

6. How would you change the pamphlet?

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7. Do you have any questions that we did not answer in the pamphlet?

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8. How do you think you will use this pamphlet?

- ☐ Read it once and throw away
- ☐ Take home for later use
- ☐ Will not use

9. Please rate the pamphlet.

Very Good ☐      Good ☐      Fair ☐      Poor ☐

**Thank you for helping us!**

February 2004

# Catalogue

## Materials Available for Patients and Families with Cancer

- The catalogue will include materials developed by:
  - Canadian Cancer Society
  - Capital Health, Cape Breton Cancer Centre and the District Health Authorities
  - Other Outside Sources / Industry

### Subject Classifications

**Breast Disease**  
**Cancer Treatment / Chemotherapy**  
**Cancer Treatment / Radiation**  
**Cancer Treatment / Palliative Care**  
**Dermatology**  
**Diagnostic**  
**Food & Nutrition**  
**Gastrointestinal**  
**General**  
**Genital Urinary**  
**Gynaecology**  
**Head & Neck**  
**Hematology**  
**Living Well With Cancer**  
**Medication Information Sheets**  
**Musculoskeletal**  
**Neuro-Oncology**  
**Pain Management**  
**Reliable Internet Sites**  
**Thoracic**

- Pamphlets developed and approved for cancer patients and families in Nova Scotia will have the following recorded in the catalogue:
  - print shop order numbers
  - name of developer (individual / group)
  - revised or created date
- **Maintenance of catalogue**
  - The Patient Education Coordinator, Capital Health will be responsible for the maintenance of the catalogue.
  - CCNS will provide clerical support.
- A copy of the catalogue is available from *Cancer Care Nova Scotia* (902) 473-3485, toll free – 1-866-599-2267.
- All cancer Guidelines for the Development of Patient Education Materials are to be reviewed every three years.

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