



COLORADO

Department of Health Care  
Policy & Financing

# Guidelines for Reader-Friendly and Person-Centered Documents

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Follow the guidelines described below to create helpful, readable and person-centered documents.

## Know your purpose and your reader/user

Clarify for yourself the purpose of your document and the characteristics of your intended readers. This will drive many of your decisions about the document, like what to include, what to leave out, how to order the information, and whether to use a technical term or a plain language substitute.

- **Purpose.** What do you want to have happen after someone reads the letter or document? If your answer to the purpose question is, "I just want people to know about it," you still haven't gotten to the heart of why this document matters.
- **Reader's knowledge of the topic.** What does the average user know about this topic? Make your best guess or do a little research to find out. Subject matter experts (you) tend to overestimate how much other people know about their topic, so use a "universal precautions" approach when you're not sure how much your reader knows: make things as simple and clear as possible.
- **Reader's concerns and motivations.** Why is it in your readers' best interests to take the steps you want them to take? Be clear about why it's important for the reader to take action – not from your perspective, but from theirs. Example:
  - NO: Your response is required in order for the Department to resolve this matter.
  - ✓ YES: Please send us proof of your income so we can process your application for benefits.

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## Organize for clarity and easy reading

- **Purpose first.** Tell the reader the purpose and point of the document within the first two sentences.
  - **NO:** In 2005, we launched an initiative to improve access to mental health services through an improved delivery system designed around regional access points. However, we recognize that the health care landscape and client needs have since changed.
  - ✓ **YES:** We are planning to change the way our clients receive their mental health services, and we invite you to take a survey to tell us share your thoughts and opinions.
- **Short paragraphs.** The reader gets overwhelmed and may not even try to read your document if you cram too many ideas into one big block of text. If you keep your paragraphs to one main idea they will be just the right length. Consider limiting your paragraph to about 8 lines for print and even shorter for web writing.
- **Descriptive headings.** Most readers will not read your document from start to finish. They will read the first few sentences and then skim the rest of the document. Make your document easy to skim by using headings that describe what that section of text contains.
  - **UNHELPFUL HEADING:** Background
  - ✓ **HELPFUL HEADING:** How Clients Currently Find Mental Health Care
- **Lists and tables.** Use bulleted lists and tables when it will make the information easier to read.

CONVERT THIS TO A BULLETED LIST: Providers should include their name, the name of any health system they are affiliated with, the accountable care organization they belong to, the estimated number of Medicaid patients they serve, estimated number of patients they serve, and the estimated number of Medicaid client they serve.

Providers should include:

- Name of practice
- Health system affiliation (if any)
- Accountable care organization
- Estimated number of patients the practice services
- Estimated number of Medicaid clients the practice serves

CONVERT THIS TO A TABLE: If a primary care practice would like to participate in the program the practice should first become a Medicaid provider and then complete the brief program application. If a specialist practice would like to participate, they should

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contact the accountable care organization. Hospitals that would like to participate should contact the director of the program.

To participate in PROGRAM NAME

| If your organization is... Take these steps... |   |
|--|---|
| <b>A primary care practice</b>                 | <ul style="list-style-type: none"> <li>• Enroll as a Medicaid provider</li> <li>• Complete the program application</li> </ul> |
| <b>A specialty practice</b>                    | Contact the accountable care organization   |
| <b>A hospital</b>                              | Contact the program director, NAME, at xxx-xxx-xxxx.  |

## Sentences

- **Subject and verb stay together.** People read sentences to find out who or what is doing something, or who needs to do what. Sentences that break that information up with a lot of other information are harder to read.
  - NO: That dog, which the family rescued last year after a spontaneous visit to a shelter that focuses on finding homes for older pets with special needs, often bites strangers.
  - ✓ **YES:** That dog often bites strangers. (This is the critical information. The writer can include the other information in another sentence if it’s relevant).
- **Active voice.** Does your sentence say who (or what) is taking action and what they are doing, in that order?
  - NO (PASSIVE VOICE): The whole cake was eaten. (We don’t know who did it. Maybe that was intentional and strategic, but use this strategy sparingly.)
  - ✓ **YES (ACTIVE VOICE):** Your brother ate the whole cake.
- **Shorter sentences.** A long sentence with a lot of clauses (and a lot of commas) probably contains too many ideas for the reader to juggle at once. Break them up into separate sentences of no more than 25 words, if possible.
  - NO: Although the corporate mismanagement, corruption, and accounting scandals at big public companies like Enron, WorldCom, Tyco, Adelphia, Health South, and Arthur Andersen that resulted in the creation of Sarbanes-Oxley Practices for Good Corporate Governance may seem like bad memories from the past, the crisis of ethics is far from over.
  - ✓ **YES:** Enron, WorldCom, Tyco, Adelphia, Health South and Arthur Anderson are big companies that had corruption and accounting scandals in the last decade. In response, the U.S. government passed the Sarbanes-Oxley Practices for Good

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Corporate Governance Act. Despite this legislation, the crisis of ethics is far from over.

## Graphics

Include graphics if they have a purpose and make the message easier to understand. It is better to create white space with text only than to cram the document full of graphics that confuse rather than clarify.

- **Pictures and illustrations.** Be sure any pictures or illustrations reinforce the message and do not detract from it. Be sure that graphics do not stereotype groups of people or communicate the wrong message or tone. For more information about how to select appropriate pictures or illustrations, consult the Department's Style Guide or check with the Policy and Communications Office.
- **Data representation graphics.** It's a good idea to make data easier to understand with infographics, charts and graphs. But make sure these data representations are clearly labeled, easy to understand, and accurately represent the data.
- **Icons.** Icons are symbols. They require the reader to interpret the symbol and determine what it means – a sophisticated thought process unless the symbol is common. Omit icons if you are not sure your audience will recognize and interpret them correctly.

## Words

- **Personal pronouns.** Government agencies often speak about themselves in the third person ("The Department") rather than using a personal pronoun ("We"). Personal pronouns like *you* and *we* help your readers know you are talking to them, especially in a letter.
  - NO: The agency will send all program participants a form to update their information every year.
  - ✓ **YES:** We will send you a form every year so you can update your information.
- **Everyday words.** Use plain, everyday language instead of jargon whenever possible. Remember that your readers usually don't know as much about the topic as you think they do, especially the jargon or technical terms. If you think it's important for the reader to learn the technical term, use it and define it– not in an appendix or a glossary, but right in the text close to where you use the word.
  - NO: These services require prior authorization, so your provider must submit a prior authorization request (PAR). See glossary for explanation of PARs.
  - ✓ **YES:** You will need prior authorization to receive these services. This means that the service will be covered *only* if you get permission first. To request permission, your provider must send us a prior authorization request (PAR).

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- **Acronyms.** Acronyms are distracting and hard for a reader to keep track of. Avoid using them unless the reader already knows the acronym (such as *MRI*) or the reader will need to know it in the future (such as the *PAR* acronym from the example above).
- **Unnecessary words.** Take out extra words so your document will be shorter and your reader won't be distracted.
  - NO: The process for getting the amendment approved has been unbelievably slow in the length of time it has taken.
  - ✓ **YES:** It took an unusually long time to get approval for the amendment.
- **Noun phrases.** It is hard to read a long string of nouns stuck together. Break them up when you can.
  - NO: independent self-directed lifelong learner approach
  - ✓ **YES:** learning approach for independent, lifelong learners
  - NO: comprehensive multi-channel marketing implementation plan
  - ✓ **YES:** plan for marketing with multiple channels

