PART 4

Understanding and using the "Toolkit Guidelines for Writing"

Chapter 2

Guidelines for organization (grouping, sequencing, and labeling the content)

U.S. Department of Health and Human Services
Centers for Medicare & Medicaid Services

TOOLKIT Part 4, Chapter 2

Guidelines for organization (grouping, sequencing, and labeling the content)

List of figures in this chapter:

This document is the second of four chapters in Part 4 of the *Toolkit for Making Written Material Clear and Effective*. The Toolkit has 11 Parts. It was written for the Centers for Medicare & Medicaid Services (CMS) by Jeanne McGee, McGee & Evers Consulting, Inc. The guidelines and other parts of the Toolkit reflect the views of the writer. CMS offers this Toolkit as practical assistance to help you make your written material clear and effective (not as requirements from CMS).

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Introduction

About the Toolkit and its guidelines

The *Toolkit for Making Written Material Clear and Effective* is an 11-part health literacy resource from the Centers for Medicare & Medicaid Services (CMS). To help you develop or revise your written material, the Toolkit includes detailed guidelines for writing and design. There are 26 guidelines for writing in Toolkit Part 4 and 46 guidelines for graphic design in Toolkit Part 5.

For background on the Toolkit, see Toolkit Part 1, *About the Toolkit and how it can help you*, and Toolkit Part 2, *Using a reader-centered approach to develop and test written material*. For the full list of guidelines for writing and design, and a discussion about how to use them, see Toolkit Part 3, *Summary List of the "Toolkit Guidelines for Writing and Design"*.

About this part of the Toolkit

Part 4 of the Toolkit focuses on the guidelines for writing. These guidelines apply to writing various types of material intended for use in printed formats by culturally diverse audiences that include people with low literacy skills (see Toolkit Part 1). (For discussion about material that is read on a computer screen, see Toolkit Part 8, *Will your written material be on a website?*)

What is this chapter about?

This is the second of four chapters on writing in Toolkit Part 4. It discusses how to apply the guidelines for organizing the content of your written material. These guidelines are shown below in Figure 4-2-a. (Other chapters in Part 4 cover guidelines for content of your written material (Chapter 1); guidelines for writing style (Chapter 3); and guidelines for engaging, motivating, and supporting your readers (Chapter 4).)

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Figure 4-2-a. Toolkit guidelines for organizing written material.

Organization Guideline #2.1

Group the information into meaningful "chunks" of reasonable size. Readers can handle only a limited amount of information at one time. To avoid information overload, divide the text in ways that will make sense to the readers. Keep each segment or section of text relatively short. When you use bulleted lists, limit the number of bulleted points (group the points into sections if the list is long).

Organization Guideline #2.2

Organize the information in an order that makes sense to the intended readers. Topics should build in a natural way, giving readers the background and context they need to understand new information.

Organization Guideline #2.3

Use headings, subheadings, and other devices to signal what's coming next. These devices are "advance organizers" that show readers how the material is grouped and sequenced, and prepare them for the next topic.

Organization Guideline #2.4

Use specific and informative wording for sections, headings, and subheadings. To reinforce the main points and help readers skim, compose text for headings that is meaningful and explicit.

Organization Guideline #2.5

Use navigational tools to help orient readers and make important information easy to find. For printed material, these tools include page numbers, headers and footers, table of contents, and index. Choose navigation tools that are appropriate for the intended readers and type of material.

Source: Created for this Toolkit. For more about the guidelines and how to use them, see Toolkit Part 3, *Summary List of the "Toolkit Guidelines for Writing and Design".*

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Pace readers through the material by grouping it into meaningful "chunks"

Organization Guideline #2.1

Group the information into meaningful "chunks" of reasonable size.

Readers can handle only a limited amount of information at one time. To avoid information overload, divide the text in ways that will make sense to the readers. Keep each segment or section of text relatively short. When you use bulleted lists, limit the number of bulleted points (group the points into sections if the list is long).

The amount of information we can hold in our minds at any one time is limited for all of us, regardless of literacy skills, and it declines with age (see Toolkit Part 9, *Things to know if your written material is for older adults*). How many items of information we can hold in memory depends on factors related to the person and the information. Studies suggest that adults with good literacy skills can rarely store more than seven independent items at any one time in their short-term memory (see discussion in Doak, Doak, & Root, 1996:64–66). Many people, including people with low literacy skills, may have trouble handling more than four or five items at once.

Given the limitations of short-term memory, here are ways to guide readers through the material and help them understand it:

- **Try to cover no more than four or five points in any one piece** (or in a single section of a longer document).

- **Divide the material into relatively short segments or "chunks."** Though "chunk" is not an elegant word, it's a convenient and flexible label for any relatively small grouping or clustering of closely-related text. For example, a chunk might be a couple of short paragraphs under a subheading, a brief list of bullet points, or a vignette. A section or chapter would consist of multiple chunks.

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- **Use plenty of chunks.** The way you divide the material shows readers how you have organized it. Using plenty of chunks helps readers follow the flow of information in the material and increases the visual appeal. If a chunk of information seems too large, try to divide it further. For example, later in this chapter, Figure 4-2-d shows how grouping a long list of 12 bullet points into three parts can make it easier for readers to absorb the information.

- **Try covering just one topic on each page or panel of a brochure**. This strategy works especially well for low-literacy materials. There's nothing wrong with ending the text at different places on each page or panel of a brochure, as long as your pages have a consistent layout and unified design.

- **Use feedback from readers to fine tune the number and size of the chunks of text in your written materials**. For ways to do this, see Toolkit Part 6, *How to collect and use feedback from readers.*

Put the information in an order that works well for readers

Organization Guideline #2.2

Organize the information in an order that will make sense to the intended readers.

Topics should build in a natural way, giving readers the background and context they need to understand new information.

Two general principles

Here are two general principles for organizing material in an effective way:

1. **Put the main messages or most important ideas at the beginning of sections and lists**, because readers tend to pay more attention to items mentioned first.

2. **Before you present new information, give readers the background and definitions they need to understand it.** By placing ideas or words in a deliberate order, you create a context that helps readers understand your messages. For example, you should explain new terms before you start using them, and you should cover the rules themselves before you mention any exceptions.

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Providing ample context is especially important when you present new material that is complex or requires significant changes in well-established patterns of behavior. For more discussion of this point, see Doak, Doak, & Root (1996).

- **Be cautious in the assumptions you make about the knowledge a reader brings to your material.** For example, starting your material with a question like *Do you perform breast self-examinations?* presumes that readers already know about the purpose of breast self-exams and how to perform them (Ramirez, Stamm, Williams, Stevenson, & Espinoza, 1996). To avoid putting readers on the spot and losing teachable moments, incorporate the definitions and explanations that people need to understand your message.

- **Remember that the need to supply context applies throughout the written material**. Building a context for understanding applies at the level of paragraphs and sentences as well as to the progression of topics as a whole. Your goal is to create a logical and continuous flow that avoids, as much as possible, forcing the reader to skip around on the page or go back and forth between pages or sections.

What order makes sense to readers?

Putting the most important information first and giving context to prepare readers for new information can help you develop a smooth and meaningful progression of topics. When you apply these two general principles, build on what you know about your readers and the issues:

- **Which topics are the most important, interesting, and useful to your readers?** You'll want to feature these topics, together with the key messages, at the beginning of sections and lists.

- **What do your readers already know? What terms and concepts will be new to them? What areas of possible concern can you anticipate?** Answers to these questions will help you decide which definitions, explanations, and reassurances you need to include, and how to arrange these in an order that makes sense to your readers.

As you work on developing the sequence of topics, you'll want to review what you have learned about your intended readers and the issues. It also helps to get reactions directly from people who represent your intended readers or from informants who know them well. For example, if your materials encourage Spanish speaking parents to enroll their children in a Children's Health Insurance Program (CHIP), you could choose informants who interact with Spanish speaking parents in various ways. Organizations that serve the local Spanish-speaking community can tell you what parents are concerned about and they can advise you on issues of cultural and linguistic appropriateness. Outreach workers and help line staff can tell you what questions parents typically ask about CHIP.

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Here are tips on ways to seek input from readers and informants during the development of written materials:

- **Focus groups.** When you are developing your ideas and text for the materials, you can get feedback and suggestions by holding focus group discussions with readers or informants. These discussions may give you insights into ways to organize the materials.

- **Interviews to get reactions to a draft**. When a draft is ready for review, show it to readers to see if the sequence of topics seems logical to them. There may be some surprises, since the sequence that seems logical to you may not be compelling to them. While you could use focus groups to get readers' feedback, talking with them one at a time in interviews will be much more informative. Individual interviews give you more privacy and flexibility to explore how readers are interpreting the material and to watch what they do with it. For a step-by-step guide to testing material with readers, see Toolkit Part 6, *How to collect and use feedback from readers*.

- **A card-sorting task.** You can use a card sorting task to find out what sequence of topics makes sense to readers. First, write each of the key messages for the material on a separate card. Then ask readers or informants to arrange the cards in order and share their comments. The patterns they create and the reasons they give can be very enlightening. You will learn what seems logical from their point of view, including what they are assuming and why they think one topic needs to come before another. This task will also help identify anything that's missing (or unnecessary) from their point of view.

Models for organizing and presenting information

Figure 4-2-b describes six models that are different ways to organize and present information. You may want to use one or more of these models in your written materials. How you apply the models depends on your purpose and on what sequence of topics works best for your intended readers.

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Figure   **4-2-b.** Six ways to organize and present information.

NEWSPAPER MODEL

How does it work?
You give the key points or most important part first, then arrange the rest in order of descending importance.

Why use this model?
This approach helps people in a hurry and readers with low literacy skills because first impressions tend to stick. It lends clarity by forcing you to identify and emphasize the most important information. You can apply this model at various levels of the material.

LIST MODEL

How does it work?
You insert a list of separate items into your material. To set these items apart, you use bullets, numbers (such as a numbered list that gives "Five tips for healthy snacks"), or other devices (such as a list of Q & A items or true-false items).

Why use this model?
Lists are easy to skim (if they are reasonably short). Visually, they attract attention and make it easier to compare and absorb the information in each item. Some lists get readers to interact with the material, which helps them learn and remember the information in the list.

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STORY MODEL

How does it work?
You insert a story, vignette, dialogue, or quotation at an appropriate place within the material. Or, use the story model for the entire material, such as using a comic book format or a photo-novel format (photographs of people with cartoon-like callouts that tell what they are saying).

Why use this model?
Stories are a natural and powerful way of sharing information. They can also convey information that is hard to present in other ways. Stories attract people's attention, raise their empathy and interest, and may help them accept and act upon the information you present. Moreover, they are the preferred approach in some cultures. (For more on this topic, see Guideline 4.2 in Chapter 4, *Engaging, motivating, and supporting your readers.*)

STEP-BY-STEP MODEL

How does it work?
You present a series of tasks or procedures to be done in a specified order. Often, each step is numbered.

Why use this model?
This model works well for patient education materials, forms, and other material with a natural sequence of tasks. Going step by step makes the tasks easier for people to understand and follow.

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HEALTH BELIEF MODEL

How does it work?

The information and sequence is:

1 – you are at risk
2 – but there's something you can do about it
3 – and you will get personal benefits if you do

Why use this model?

This is a popular approach in materials that seek to change the reader's attitudes and behaviors. How well it works depends on how well it fits with the reader's needs and interests, and how well it is implemented. If you use this model, be sure to pre-test it carefully with your intended readers.

MEDICAL MODEL

How does it work?

Typically, you give the information in this order:

1 – describe the disease itself
2 – give statistics on its frequency, cure rate, etc.
3 – discuss how it is treated
4 – discuss the efficacy of treatments and medications
5 – tell about side effects
6 – give other information

Why use this model?

This approach gives health practitioners the medical details in a format that is logical and familiar to them. It's a specialized model for a specific audience and purpose. **Don't use it for the general reader!**

Source: The list model was created for this Toolkit. The descriptions of all other models (not the formatting) are adapted from Table 6-2 in *Teaching Patients With Low Literacy Skills,* Second Edition, by Cecilia Doak, Leonard Doak, and Jane Root (1996:82–83). Used with permission. For more discussion of models for writing, see Doak, Doak, & Root (1996), Chapter 23.

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The first three models in Figure 4-2-b – the newspaper model, list model, and story model -- are the most versatile. All three are suitable for any audience, and they work especially well for less-skilled readers. The newspaper model follows the basic principle of placing the main messages or most important ideas at the beginning; you probably use it often. Try the story model, too, if you are not already using it in your materials. It adds a human touch and voice to information that can be quite powerful. If you happen to have information with a defined sequence of tasks, the step-by-step model works very well.

As noted in Figure 4-2-b, unless your audience is health professionals, you will want to avoid using the medical model.

The example in Figure 4-2-c below illustrates how several of the models might be applied. It contrasts two ways of presenting information to Latinos about cocaine abuse, emphasizing the importance of taking the culture of the intended readers into account when you frame your messages.

Figure   4-2-c. Comparing two ways to present information.

This example comes from *You Can Prepare Easy-to-Read Materials* (Center for Substance Abuse Prevention [CSAP], 1994). It emphasizes the need to tailor the content and sequencing of messages to the intended audience.

VERSION 1

This version combines elements of the health belief model and the medical model shown in Figure 4-2-b)

This version gives the following information:

1 - Statistics about the prevalence of overall drug abuse in the United States and the prevalence of cocaine abuse among different population groups

2 - Risk factors related to the use of cocaine

3 - A strong message to stay away from cocaine

This content and sequence may seem like a logical and compelling way to educate people about the dangers of cocaine abuse. But will giving statistics and risk factors, then warning against cocaine use, be persuasive to the intended readers? Notice that **this approach appeals solely to their intellect**, and not to their emotions or cultural values.

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VERSION 2

This version is geared to cultural values. It uses some elements of the story model shown in Figure 4-2-b

This version gives the following information:

1 - Latinos' pride in their culture

2 - How Latinos have solved other problems

3 - The need for Latinos to tackle drug abuse issues

4 - Specifically what Latinos must do about cocaine abuse

You Can Prepare Easy-to-Read Materials suggests that this version which is geared to cultural values would be more effective with a Latino audience.

Source: The basic outlines in each version are adapted from an example in *You Can Prepare Easy-to-Read Materials,* Center for Substance Abuse Prevention (CSAP), *Technical Assistance Bulletin*, September 1994:3. Distributed by the National Clearinghouse for Alcohol and Drug Information, http://ncadi.samhsa.gov/govpubs/MS499/. See reference at end of this chapter.

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Use plenty of headings and subheadings

Organization
Guideline
#2.3

Use headings, subheadings, and other devices to signal what's coming next.

These devices are "advance organizers" that show readers how the material is grouped and sequenced, and prepare them for the next topic.

Once the material has been grouped into chunks and sequenced in an order that will make sense to readers, the next step is to add labels to guide readers through the material. Formatted to stand out from the regular text, these labels serve as "advance organizers" that prepare readers for the next topic and help them locate information of personal interest.

Usually, the labels are headings or subheadings, but there are other options. For example, if you have written a short piece with a strong lead sentence at the beginning of each paragraph, using boldface type for the lead sentences turns them into advance organizers. With appropriate formatting, a lead-in sentence, brief paragraph, or a summary set of bullet points can also serve as an advance organizer.

Whatever form they take, the labels that serve as advance organizers are crucial. They make it easy for readers to recognize and follow your carefully crafted sequence of topics. They also break up the "wall of text" that is intimidating to poor readers.

Figure 4-2-d provides an example of advance organizers. It shows two versions of the same list of 12 bullet points: the first is a long list, and the second has been broken up by adding three subheadings.

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Figure   **4-2-d.** Subheadings make a long list of bulleted points easier to read.

No subheadings

> **What children of all ages need to know:**
>
> - Nothing your child did, thought, or said caused you to get cancer.
> - You can't catch cancer from another person. Just because you have cancer does not mean that others in your family will get it, too.
> - Just because you have cancer does not mean you will die from it. In fact, many people live with cancer for a long time.
> - Scientists are finding many new ways to treat cancer.
> - Your child is not alone. Other children have parents who have cancer.
> - It is okay to be upset, angry, or scared about your illness.
> - Your child can't do anything to change the fact that you have cancer.
> - Family members may act differently because they are worried about you.
> - You will make sure that your children are taken care of, no matter what happens to you.
> - They can help you by doing nice things like washing the dishes or drawing you a picture.
> - They should still go to school and take part in sports and other fun activities.
> - They can talk to other adults such as teachers, family members, or religious leaders.

With subheadings

> **What children of all ages need to know:**
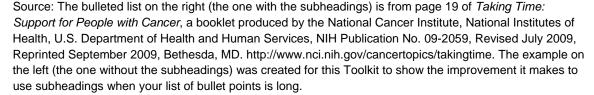>
> **About cancer:**
> - Nothing your child did, thought, or said caused you to get cancer.
> - You can't catch cancer from another person. Just because you have cancer does not mean that others in your family will get it, too.
> - Just because you have cancer does not mean you will die from it. In fact, many people live with cancer for a long time.
> - Scientists are finding many new ways to treat cancer.
>
> **About living with cancer in the family:**
> - Your child is not alone. Other children have parents who have cancer.
> - It is okay to be upset, angry, or scared about your illness.
> - Your child can't do anything to change the fact that you have cancer.
> - Family members may act differently because they are worried about you.
> - You will make sure that your children are taken care of, no matter what happens to you.
>
> **About what they can do:**
> - They can help you by doing nice things like washing the dishes or drawing you a picture.
> - They should still go to school and take part in spports and other fun activities.
> - They can talk to other adults such as teachers, family members, or religious leaders.

Source: The bulleted list on the right (the one with the subheadings) is from page 19 of *Taking Time: Support for People with Cancer*, a booklet produced by the National Cancer Institute, National Institutes of Health, U.S. Department of Health and Human Services, NIH Publication No. 09-2059, Revised July 2009, Reprinted September 2009, Bethesda, MD. http://www.nci.nih.gov/cancertopics/takingtime. The example on the left (the one without the subheadings) was created for this Toolkit to show the improvement it makes to use subheadings when your list of bullet points is long.

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Adding the subheadings is an improvement in two ways:

- **The subheadings reduce cognitive burden and guide the reader through the material.**
  Instead of giving readers a long list of 12 points to work through on their own, the version with
  subheadings makes the underlying organization explicit. The subheadings point the way by
  showing readers three categories of things to talk about with a child. This makes the content more
  manageable and gives readers a head start in applying the information to their own situation.

- **Dividing the material into manageable chunks adds visual appeal as well.** Identifying three
  coherent groups of advice contributes to this appeal. The formatting follows Toolkit Guideline 7.3
  for formatting of bulleted text, which calls for using bullets in a simple shape and appropriate
  size, indenting the columns of bulleted text under each subheading to make the subheadings easier
  to notice and read, and adding a little extra space between bulleted points to make them easier to
  read. (This guideline is in Toolkit Part 5, Chapter 4, *Guidelines for headings, bulleted lists, and
  emphasizing blocks of text).*

Make headings specific and informative

Organization Guideline #2.4

Use specific and informative wording for sections, headings, and subheadings.

To reinforce the main points and help readers skim, compose text for headings that is meaningful and explicit.

Section titles, headings, subheadings, and captions for illustrations are powerful tools to increase
comprehension because they catch the reader's eye. Compose them carefully so that readers who are
skimming through your material will grasp its overall organization and pick up all of the main points.
When your labels are effective, it's easy for people to locate the information they are looking for.

Make headings, subheadings, and other labels in your written material as short as you can while still
being explicit and informative. Very short headings of just a word or two can be ambiguous or even
misleading, and they seldom give readers a good sense of what's coming next.

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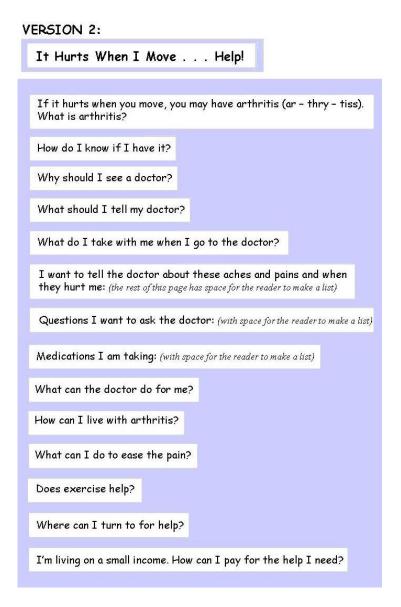
Figure 4-2-e compares two versions of headings for a booklet. Most of the headings in Version 2 are posed as questions. This works well for many readers, though it tends to make the headings a bit longer. The brief headings in fictional Version 1 give only a general sense of what the booklet covers.

Figure 4-2-e. Comparing two versions of headings for a 12-page booklet.

The headings in Version 2 are from a real booklet written for people with limited reading skills. There's a heading at the top of each page (a few of the pages have more than one heading). Most headings are framed as questions. The booklet includes two pages that invite the reader to make notes in preparation for a visit to the doctor.

VERSION 1:

Arthritis and You

Symptoms of arthritis

Treatment

Arthritis pain

Exercise and arthritis

Resources

VERSION 2:

It Hurts When I Move . . . Help!

If it hurts when you move, you may have arthritis (ar – thry – tiss). What is arthritis?

How do I know if I have it?

Why should I see a doctor?

What should I tell my doctor?

What do I take with me when I go to the doctor?

I want to tell the doctor about these aches and pains and when they hurt me: *(the rest of this page has space for the reader to make a list)*

Questions I want to ask the doctor: *(with space for the reader to make a list)*

Medications I am taking: *(with space for the reader to make a list)*

What can the doctor do for me?

How can I live with arthritis?

What can I do to ease the pain?

Does exercise help?

Where can I turn to for help?

I'm living on a small income. How can I pay for the help I need?

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Source: The headings in Version 2 are from *"It Hurts When I Move . . . Help!"* a brochure produced by the Arthritis Foundation, Maryland Chapter, Inc./Judy White, PhD. Adapted and used with permission. To reach the Arthritis Foundation, Maryland Chapter, Inc., call 1-800-365-3811 or visit http://www.arthritis.org/chapters/maryland/. Version 1 is a fictional example of headings created for this Toolkit to show contrast with headings in the real booklet.

It's easier to write an informative heading when the material is divided into a number of relatively short chunks of text. If the chunks of text are long, it may be impossible to write good headings because each chunk has too many topics. The solution is to create more chunks.

You can use feedback from sessions with intended readers to test whether your labels are sending the message you intend. Start by putting each title, heading, and subheading on a separate card. Show the cards one at a time, and ask people to tell you what they think a section with that heading would be about. This may be very revealing.

A good example of how people interpret headings comes from a study of consumers' reactions to a comparison chart showing results from a Consumer Assessment of Healthcare Providers and Systems survey (AHRQ/CAHPS). Consumers interpreted the short heading, *choice of doctors*, in many different ways. Some thought it meant having a large number of doctors, some thought it meant you could either choose or you couldn't, and still others thought it suggested something about quality. Consumers made more consistent (and accurate) interpretations of a longer heading that was more specific: *easy to find a doctor you are happy with* (McGee et al., 1999:MS37).

The words you choose for your labels are important, but so is the way you format them. For tips on how to use type styles, contrast, and other graphic elements to enhance the impact of headings, subheadings, and other labels, see Toolkit Part 5, *Understanding and using the "Toolkit Guidelines for Graphic Design"*.

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Use reference devices to help readers navigate through the material

Use navigational tools to help orient readers and make important information easy to find.

For printed material, these tools include page numbers, headers and footers, table of contents, and index. Choose navigation tools that are appropriate for the intended readers and type of material.

Organization Guideline #2.5

We've already mentioned that headings, subheadings, and captions for illustrations serve as navigation tools that can help readers skim and find information of interest. Reference devices such as page numbers and table of contents are also navigation tools. Depending on the material and your intended readers, these and other reference devices can be quite helpful.

Page numbers

If the material has pages, it usually makes sense to number them. Even if a booklet is short, the page numbers can be a useful point of reference as a navigation tool.

Table of contents

This basic reference device is familiar to most readers, and easy for them to use. If your written material is lengthy, covering more than about five main points, add a table of contents to provide the road map a reader needs. You should definitely add a table of contents to any document that is intended for ongoing reference. Shorter pieces with well-labeled sections ought to be able to stand on their own.

Headers and footers

When documents are long, adding a header or footer can help orient readers. Headers and footers are printed outside of the main text area of the page, either at the very top (a header) or at the very bottom (a footer). Typically, headers and footers are used to give the name of the section or chapter, to help readers know at a glance which part of the material they are in. (Headers or footers that show only the title are the

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same on every page, which makes them useless as a navigation device.) Often, headers or footers include the page number, though you can number pages without using a header or footer.

- **You can use either a header or footer, or you can use both.** Usually, it works better to choose one or the other, for a less cluttered look.

- **Headers tend to work better than footers as a navigation aid,** because their position at the top of the page makes them more prominent. This Toolkit uses headers.

- **Headers and footers tend to work best for skilled readers**. Do not rely on them as a major navigation device in material designed for less-skilled readers. In many feedback sessions done by the author, less-skilled readers have frequently overlooked or ignored headers and footers. Instead, they tend to search for particular information by flipping through the pages and skimming the text.

Index

In reference materials, an index can be of tremendous help. However, an index is effective only when your readers know what it is, how to use it, and it includes the words and terms they are searching for. Here are suggestions to make an index reader friendly:

- **Consider calling the index by a more descriptive name**. Many less-skilled readers have never heard of an index, but they may be able to use it if you give them some help. For example, you could expand the title to say *Index (a list of topics and the page numbers where they are covered).*

- **Where applicable, index the same topic in different ways to reflect differences in how readers might look it up**. For example, suppose that you want to include the topic of benefits and services in your index. Some readers might look this up by searching for the word benefits, while others would start by looking for services, or coverage, or medical care. To help your readers find the information quickly and easily, you could include four entries (benefits, services, medical care, and coverage) instead of just one (benefits and services).

- **When acronyms are used, include them in the index as separate listings, and spell out what they stand for**. For example, include one entry for PCP (Primary Care Provider) and another entry for Primary Care Provider (PCP).

- **Show the page number for every entry in your index**. Don't send your readers to a different entry to get a page number, such as saying *PCP—see Primary Care Provider.* Instead, say *PCP (Primary Care Provider)* and then give the page number. Forcing people to look in two places just to get the page number will discourage poor readers and annoy the rest.

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- **When there are multiple page numbers for a given word or phrase, list them in a *meaningful* order rather than automatically listing them in *numerical* order**. When there are several page numbers for an entry, put the page number for the *main discussion* first, so that readers who turn there will find the most extensive treatment of the topic they are interested in. Also, if there is a definition on one of the pages in the entry, identify it (such as: *Deductible ....35 (gives a definition), 20, 47*).

These tips about adding detail and deliberate redundancy to your index will make it a bit longer, but it will make it far easier for readers to understand and use. In particular, it will help teach less-skilled readers about how to find particular topics, and help keep them from getting so discouraged that they quit using the Index after an unsuccessful try.

If you are creating an index for your material, check to see if your word processing software includes tools for building an index.

Glossary

Most people don't use glossaries. It's a burden on any reader to look up a word, and it's especially hard on less-skilled readers. They are the ones most likely to need the definitions, but they may lose their train of thought when they interrupt their reading. They may also have more trouble applying a formal definition to something they've just read.

When a word or term is likely to be unfamiliar or difficult, the best solution is to **incorporate a definition into the text** (for more about this, see guideline 3.4 in Toolkit Part 4, Chapter 3, *Guidelines for writing style*).

But even when you include definitions as part of the regular text, there may be reasons to include a separate section of definitions as well. For example, adding a glossary gives you an opportunity to expand on the meaning of the word or add legal or regulatory language that must be included in the material. If you add a glossary for reference, don't rely on it as a substitute for incorporating definitions in the text for reader comprehension, and don't label it *glossary,* because this word is unfamiliar to many readers. Use a more familiar word instead, such as *dictionary*, or a descriptive phrase, such as *List of definitions.*

Appendix

In a large document, writers sometimes put less important information or reference material into an appendix. Be cautious about using an appendix in your materials. In sessions with Medicare beneficiaries to get their reactions to a large reference document, the author found that many of them were unfamiliar with both the word and concept, and were unaware that the appendix is always at the end of a document. As a result, they were confused when they encountered a reference to the appendix.

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References to other sections

In a large document that covers numerous topics, writers often insert references to other sections. Unless you are writing for an audience of skilled readers, try to minimize references of this sort. They can be distracting and frustrating to readers who are not accustomed to seeing them, and may make the material harder for them to use. Unless you include a page number, readers who flip through the pages rather than turn to the table of contents or use the headers will find it burdensome to locate the other section. They may also react negatively if they see no reason for the reference or have little sense of what information they would find if they turned to the other part of the document.

Usability testing to check on ease of navigation

If the material is long and complex, "usability testing" with your intended readers will show how well your navigation devices are working. For example, you can interview readers and ask them to find particular items of information in the material, and then watch how easy it is for them to do. For tips on how to do this, see Toolkit Part 6, *How to collect and use feedback from readers.*

End notes

Thanks to Julie Carson and Mark Evers for their contributions to this chapter.

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> The CAHPS program is a public-private initiative to develop standardized surveys of patients' experiences with health care. CAHPS results are used by health care organizations, public and private purchasers, consumers, and researchers. For more information, see https://www.cahps.ahrq.gov/ (accessed September 8, 2006).

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