

# Webinar Series



Health Literacy  
**Solutions Center**





# How to Create Effective Patient Education Materials

**Phyllis Mancini**

University Health Network

**Alina Rodrigues**

University Health Network



# Welcome to the Webinar

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# About the Speaker

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## **Phyllis Mancini**

Phyllis Mancini joined the University Health Network in 2005 and has been supporting clinicians and educators with their patient education needs by offering plain language workshops, coaching, and editing & publishing support for online and print materials for years. She holds a Masters in English and has a background in adult education and communications. She completed the Plain Language Certificate from Simon Fraser University in 2019 and is a long-time member of Editors Canada.

## **Alina Rodrigues**

Alina Rodrigues holds a Masters in Education specializing in Adult Education and Community Development from the University of Toronto. She is the Patient Learning and Development Coordinator at University Health Network with experience in health system navigation, health literacy and creating effective patient education materials with a focus on equity and inclusion. In her current role, she supports the creation of patient learning materials to develop tools and guides for patients to understand their health in plain language.



# Objectives

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- ✓ Create effective patient education materials using the 7 standard components.
- ✓ Understand which formats and tools work best for various intended audiences using the resources provided.
- ✓ Discuss the importance of effective patient education materials and identify at least 3 ways in which these resources can address barriers in access to care.



# 7 Standard Components for Building Patient Education Materials

- **Work on each component when it suits your project.**
- **You can work on more than one at a time.**
- **You may need to revisit a component a few times as you develop the patient education.**



# 7 Standard Components for Building Patient Education Materials

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1. Describe audience and learning needs
2. Research topic to find gaps
3. Decide what format works best
4. Draft your content
5. Test with your audience
6. Get clinical sign off
7. Create a roll out plan



# 1. Describe your audience & their learning needs

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- Include as many details as you can about your audience and their learning needs to help focus on the content needs.
- Revise your descriptions as you learn more about patient needs.

## Ask yourself:

- Who is the intended (primary) audience? Secondary audiences?
- What do you want your audience to know or do? For example:
  - "I want \_\_\_\_\_ to \_\_\_\_\_."

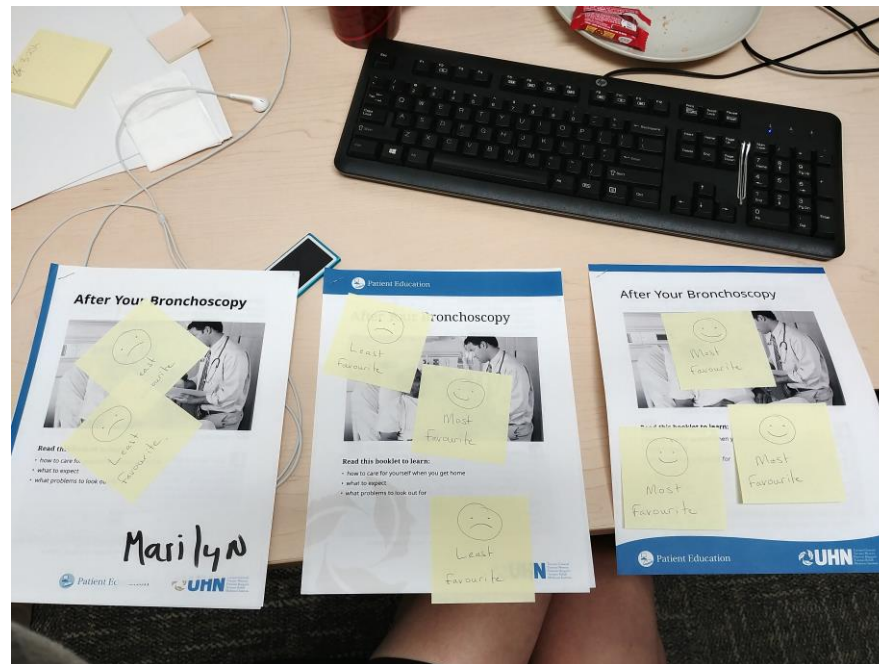




# 1. Describe your audience & their learning needs

## Example: Patient Education Brochure redesign project

- Used a human-centered design approach





# 1. Describe your audience & their learning needs





## 2. Research the topic to find the gaps

- Check internal and external sources to see if there is existing patient education that meets your audience's learning needs.





## 2. Research the topic to find the gaps (cont'd)

- Assemble a team of experts to develop the education.
- Ask what patients want and need to know.







# 3. Decide what format works best





## 4. Draft your patient education content

- Write the content and edit for clear communication and design

The draft form is titled "University Health Network" and "Consent to Treatment". It contains several sections for patient information, including a statement of authorization, understanding of the treatment, and a section for the patient's signature. The form is marked with a large "DRAFT" watermark.

### BEFORE

I, \_\_\_\_\_ hereby authorize \_\_\_\_\_ to perform the proposed procedure(s) described below (including all preliminary and related procedures, and any additional or alternative procedures as may become medically necessary during the course of the diagnostic procedure and/or treatment).

The final form is titled "University Health Network" and "Consent to Treatment". It includes a green "FINAL" stamp in the top right corner. The form contains detailed sections for patient information, including a statement of authorization, understanding of the treatment, and a section for the patient's signature. The form is marked with a large "FINAL" watermark.

### AFTER

Your doctor has proposed this treatment. You have the right to decide whether to accept this treatment or not. If there is anything you do not understand, ask the doctor or health practitioner.

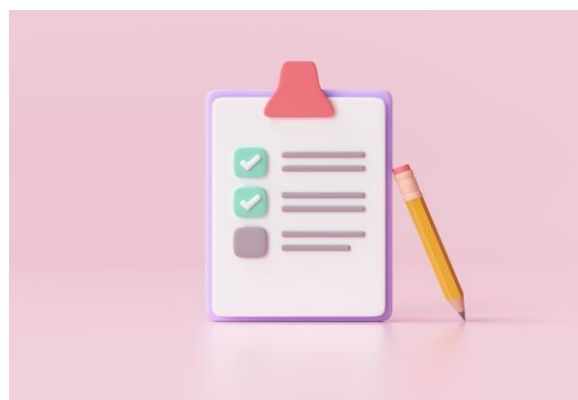
The doctor or health practitioner has fully explained to me:

- What the treatment is,
- Why the treatment is needed, (...)



## 5. Test with your intended audience

- Confirm the education meets the learning needs
  - interviews (especially media scripts)
  - surveys (especially shorter written materials, posters, in-person or virtual education)





## 6. Get clinical sign off on the content

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- Ask the subject matter experts review the information for accuracy and consistency.
- Make sure the content aligns with applicable your standards. For example: branding, privacy, technology, accessibility standards
- Get authorization if required.

**Remember:** You may need to re-test the draft with your audience if you make substantial changes at this step.

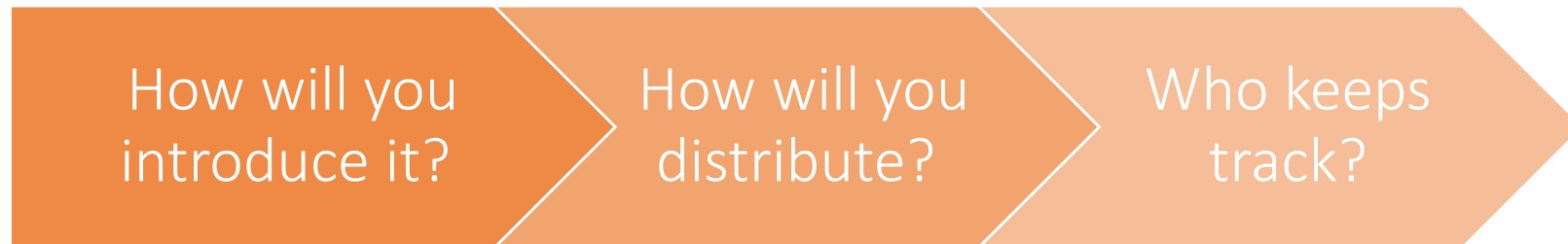




## 7. Create a roll out plan

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- **Plan how the education will be incorporated into patient care**





## 7. Create a roll out plan (cont'd)

- **Keep the education up to date**
- Plan to review and change the education regularly (set a schedule, who is responsible, create crisis management plan)





## 7. Create a roll out plan (cont'd)

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- **Create an evaluation plan to see if education is effective**
- Consider:
  - What may change as a result of your new education?
  - How will you collect your feedback?
  - Who is responsible for compiling, keeping track of and responding to feedback?
  - How will you use the feedback?



# Formats and Tools

- **Formats suitable for your audience and when to use them**
- **Questions to consider when making patient education materials**



# Print Formats

Format	What is it?	When to Use it?
Brochures	<ul style="list-style-type: none"><li>Printed documents that provide detailed information on a specific topic</li><li>Usually, 10 pages or less</li></ul>	<ul style="list-style-type: none"><li>Words and images are used to reinforce a message</li></ul>
Manual	<ul style="list-style-type: none"><li>Longer document used to help patients understand a health condition/treatment</li><li>Information can be broken into chapters/sections to focus on a different topic</li></ul>	<ul style="list-style-type: none"><li>Complex treatments or conditions in which patients will follow similar care path</li></ul>
Poster/Flyer	<ul style="list-style-type: none"><li>Used to quickly share a simple message to many people</li><li>Posted in public areas to increase visibility or certain areas to target specific audiences</li></ul>	<ul style="list-style-type: none"><li>Encourage people to take an action or remind people of important information</li></ul>



# Online Materials

Format	What is it?	When to Use it?
Webpage	<ul style="list-style-type: none"><li>• Written materials are freely available online</li><li>• Can have other images embedded in them (videos, images, eLearning)</li></ul>	<ul style="list-style-type: none"><li>• Have a large amount of content that you need to deliver to patients</li></ul>
E-Newsletter	<ul style="list-style-type: none"><li>• Collection of materials (articles, videos, posters) that are distributed to readers via email</li></ul>	<ul style="list-style-type: none"><li>• Inform patients/caregivers of program activities at a set schedule</li></ul>
Apps (mobile or web)	<ul style="list-style-type: none"><li>• Can be used by anyone with access to technology</li><li>• Used in health care to track, educate or connect patients</li></ul>	<ul style="list-style-type: none"><li>• Patients can have direct access to their health information</li></ul>



# More formats for Patient Education Materials

## Class

- Patients are able to interact with one another, learn from each other
- Ex. Chronic Disease Self-Management courses/classes, Prenatal classes

## Online Videos

- Can be led by clinicians, allied health care professionals, health educators
- Helpful to demonstrate information to patients
- Ex. Health Taks at UHN

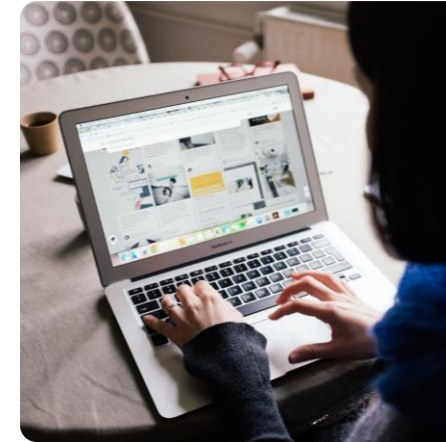




# Social Media

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- Social media is an excellent way to connect with patients about current events, service changes and connect patients with one another
- Plan to spend a few hours a week posting content on social media and interacting with users
- Keep the 'social' in social media
- Understand which social media platform may be best for your target audience (Instagram, Threads, Facebook, Twitter, YouTube)







# Questions to Consider

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## 1. What resources do you have available to create and maintain the patient education material?

- Is there funding to hire a trained professional or production company?
- Do you have software, equipment and training within your team to create patient education resources?
- How many hours per week or month can you dedicate to maintain or monitor the education?



# Questions to Consider

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## 2. What are your content needs?

- Is the education the main source for learning?
- Do you need to cover a lot of topics?
- Do you need to respond to learner's educational needs as they are learning?
- Can the material be easily updated as learner needs evolve, or new needs emerge?
- Do you need to demonstrate an action patient's need to take?
- Do patients need to interact with each other?



# Questions to Consider

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## 3. What use and access considerations do you have?

- Is the education available only to certain people or groups?
- Do you need to deliver the education in person or virtually (online)?
- Do you need to track the number of people who use the education? Do you need to track specific people that have used the education?



# Importance of Effective Patient Education Materials

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- ✓ Patients and families are provided with high quality information that is accessible and accurate
- ✓ Reduces barriers to access health care (through various formats of educational materials)
- ✓ Patients can advocate for themselves and navigate the health care system more effectively
- ✓ Patients can feel understood and heard when they are consulted on created patient educational materials
- ✓ Support the burnout health care systems and professionals may face

....and more!



# What questions do you have?

**Please type your questions in the Q&A box.**



# Thank you for Attending

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