



TOOLKIT for Making Written Material Clear
and Effective

SECTION 2: Detailed guidelines for writing
and design

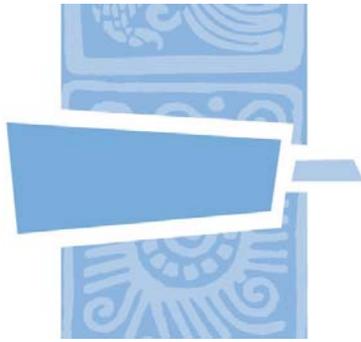
PART 4

Understanding and using the “Toolkit
Guidelines for Writing”

Chapter 1

Guidelines for content of your
written material

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



TOOLKIT Part 4, Chapter 1

Guidelines for content of your written material

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This document is the first 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).



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 and Medicaid Services (CMS). It has practical tools to help you improve printed material you develop for people who are enrolling in or receiving services from CMS programs such as Medicare, Medicaid, or Children’s Health Insurance (CHIP). These CMS audiences are culturally diverse and they include people with limited reading skills and older adults such as people with Medicare.

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. While these Toolkit guidelines emphasize ways to make written material clear and effective for CMS audiences, most of them reflect general principles for effective communication of information to *any* audience. They are offered as practical assistance to help you make your written material easier for people to understand and use (not as requirements from CMS).

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

Figure

4-1-a. Toolkit guidelines for content of written material.



Make the purpose and usefulness of the material immediately obvious. Use the title and other upfront text to make clear to readers what the material is about, who it is for, and how to use it. Remember that readers skim and make quick judgments about what’s worth reading.



In choosing which content to include, be guided by the readers’ interests, knowledge, and needs (which may be quite different from your own). Focus on what matters most to the intended readers. Address their issues and concerns, as well as areas of possible misunderstanding.



Show awareness of and respect for diversity among intended readers. Choose content that is culturally appropriate for the intended readers, reflecting and responding to differences in their experiences and situations.



Repeat new concepts and summarize the most important points. All readers need time to absorb new information. Repetition helps them remember it.



Make sure that the information is accurate and up to date. Check the facts. Involve subject matter experts from the beginning, and have reviewers check on accuracy. Proofread carefully at the end, not relying just on a spell-check program.



Limit the information to an amount that is reasonable for the intended readers. Too much text can be overwhelming, especially to less-skilled readers. If the material is too long, consider other ways to package it. If you condense it, don’t oversimplify or drop the examples and explanations that readers really need.



Identify the organization that produced the material, and include a publication date and contact information. Including contact information makes it easy for readers to follow up with questions or ask for permission to reprint the material. Including the date will help remind you when it’s time to update the information.



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”*.



Can readers tell at a glance what the material is for?



Make the purpose and usefulness of the material immediately obvious.

Use the title and other upfront text to make clear to readers what the material is about, who it is for, and how to use it. Remember that readers skim and make quick judgments about what’s worth reading.

Make it easy for your intended readers to figure out both what is covered in your written material and what they are supposed to do with it. Just like you, they make snap judgments about written materials based on a quick glance: *What’s this about? Should I bother to read it?*

If the content and purpose are not evident from the title and other prominent text, many people you’re trying to reach won’t give the material a second glance. And if the title is ambiguous or misleading, you may attract the wrong audience. So pay careful attention to how the title and other prominent text will shape a reader’s first impressions. Keep in mind that you already know the purpose and content of the material, but the reader does not. The title, subtitle, and other upfront text are your first and best chance to attract the reader’s attention, so make them informative and appealing.

When you start to write your material, giving it a working title helps you focus and reminds you of the purpose of your work. Later, when the first draft is complete, take a critical look at your working title. If

this title were all you could see, would you have a good sense of what to expect? Does it give enough clues about the subject matter and the intended audience?

Suggestions for creating an effective title and upfront text

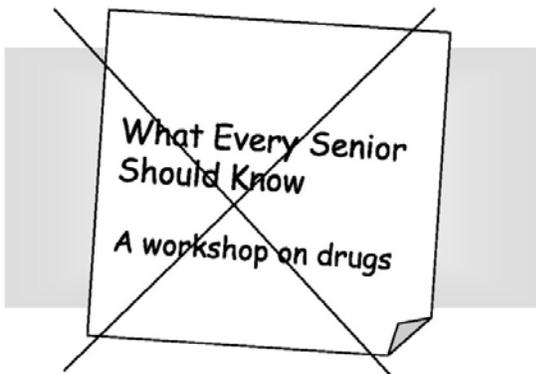
- **Make it specific and informative.** If the title is vague or misleading, you may lose your prospective readers at the outset. Try to build in a clear and compelling message about what the material is about and what people will gain from reading it. It helps to be specific. Together with the other upfront text, the title and subtitle should answer the reader’s questions: *What’s this about? How can I use it?*
- **Choose your words and phrases carefully to capture the interest of the intended readers.** You want to draw readers in, not push them away. A poster created by a Medicaid program to publicize its resources for pregnant teenagers provides a good example. The title draws attention: “Pregnant? Now what?” Then the subtitle gives a pregnant teen reason to keep reading: “Give your baby a healthy start. One call gets you connected to care.”
- **Use enough words to be meaningful (but not too many).** When titles are very short, it can be hard to know what they actually mean. For example, if a title were “Choosing Quality,” would you know what the material was about? Long titles are a problem too, because they can’t be read at a glance. They may also discourage readers by suggesting that the material itself will be long and complicated. You can keep the title fairly short, and then use a subtitle and other upfront text to expand on its meaning. See the example below in Figure 4-1-b.

Figure

4-1-b. Examples of titles.

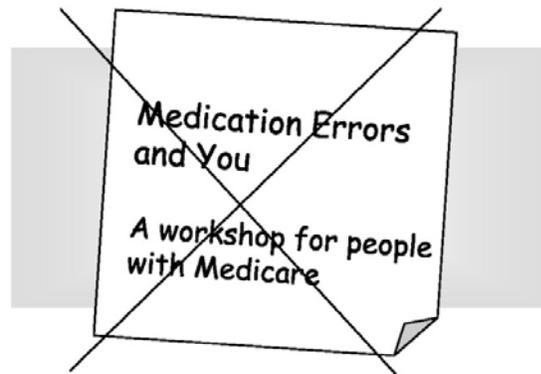
Suppose that your organization is sponsoring a free workshop to help people with Medicare reduce medication errors. What would be a good title for the workshop? Some options are shown below.

This title is not very informative, and it could be misleading:



This title doesn't identify the subject matter or audience very well. Is it an anti-drug workshop for high school seniors, or is it something about prescription drugs for older adults?

This one is more specific, but how will people react to it?



"Medication error" is health care jargon – will people with Medicare understand what this term means? The phrase "... errors and you" may sound a little frightening – will this attract their attention or scare them away?

The title shown below is more specific and more inviting.



This title gives a clear message about the purpose, content, and intended audience. The wording of the title makes the event sound practical and helpful.

"Program" may be a better word choice than "workshop" because it is more familiar and sounds more neutral (to a Medicare audience, "workshop" may suggest that there's going to be a lot of work to do).

Notice that the subtitle adds the word "free." It also identifies the sponsor – a community agency that the intended audience members will trust.

Source: Created as a fictional example for this Toolkit.

- **Rely on feedback from members of your intended audience as the ultimate test of how well your title and upfront text are working.** A title that seems informative and motivating to you and others who create the written material may not make sense or appeal to the people you are trying to influence. The best way to know whether a title is working well is to get reactions from people who represent your intended readers (see Toolkit Part 6, *How to collect and use feedback from readers*).

What do the readers want and need to know?



In choosing which content to include, be guided by the *readers'* interests, knowledge, and needs (which may be quite different from your own).

Focus on what matters most to the intended readers. Address their issues and concerns, as well as areas of possible misunderstanding.

This guideline goes to the heart of what it takes to produce effective written materials. The content you include must capture the attention and interest of your intended readers and give them something they find useful. If it doesn't, nothing else you do will matter very much.

This guideline helps you focus on the content that matters most from the reader's point of view. While this may sound simple, the implications are profound. When you are working on written materials, the gaps between you and the intended readers can make it hard for you to look at the materials from their perspective. Here are some possible gaps:

- **A gap in understanding the purpose.** You have a head start because you know why you are writing the material and what you want readers to do with it. Readers have to figure this out.

- **A gap in literacy skills.** You are a highly skilled reader and may take your skills for granted. Many of the intended readers may be much more limited in their reading skills.
- **A gap in knowledge and expertise.** For you, the content is already familiar and very easy to understand. For the intended readers, it is less familiar and possibly hard to understand.
- **A gap in time spent with the material.** You have spent a great deal of time creating the material, and have probably read it from beginning to end a number of times. Readers may spend only a few moments skimming through it, or they may skip around and never read the whole thing.
- **A gap in the benefits you see.** You are strongly positive about the content and think it is valuable for the readers to know. Readers need to be convinced about what they’ll gain from it.
- **A gap in how invested you are and how much you care.** Your expectations for the material may be high. For readers, it is just one of many possible things to read (and they may not like to read).

Given these gaps, it can take some extra effort to understand the reader’s perspective. It’s worth this effort, though, because understanding the reader’s perspective is the key to producing materials that people will notice, understand, and use.

To help learn ways to take the reader’s perspective as you develop and test written materials, see Toolkit Part 2, *Using a reader-centered approach to writing and design*, and Toolkit Part 6, *How to collect and use feedback from readers*.

Is the content culturally appropriate?



Show awareness of and respect for diversity among the intended readers.

Choose content that is culturally appropriate for the intended readers, reflecting and responding to differences in their experiences and situations.

Consider the following examples:

- An Asian American woman who has diabetes is reading a nutrition and recipe guide for people with diabetes. She skims through it and then throws it away. The photos and recipes feature meat and dairy products – foods she seldom eats. The guide doesn’t include any of her favorite Asian foods. It emphasizes recipes to fix from scratch – something she seldom does.
- A nursing home activity director is reading a booklet on ways to use music to encourage nursing home residents to get more exercise. He notices that all of the examples focus on residents who use canes and walkers. He wonders how to apply the booklet’s suggestions to the residents who use wheel chairs or have to stay in bed most of the day.

In both of these examples, the material is not working well because it doesn’t include the specific information these readers needed. Most likely, the people who produced the material didn’t exclude this information on purpose—they just didn’t pay enough attention to the diversity among their intended readers and the situations they face. The content they omitted kept them from connecting with some of their intended readers.

Showing respect for diversity can be subtle and complex. The people who read your material will relate to it when they can see themselves in it. Yet at the same time, they will read your material as individuals and want to be regarded personally, not as members of a group. Here are suggestions for ways to show awareness of cultural differences and respect for individuals in the content of your materials:

- **Do research about the intended readers and get their reactions to the materials.** Knowing your readers well makes it easier to choose content that responds to their interests and needs. It can help you avoid conspicuous omissions that keep you from connecting with some of your intended readers (as shown in the examples above about exercise for nursing home residents and diabetes nutrition). Getting reactions directly from readers is the best way to make sure that the materials are attuned to their cultural and linguistic practices, using portrayals and examples they find acceptable. For example, Figure 4-1-c below shows how paying attention to readers’ reactions led to a change in phrasing of a survey question.
- **To make it easy for readers to relate to what you say, choose content that fits with their logic, language, and experience.** For example, for members of cultures that tend to be highly family centered in their decision making, your messages should take account of the family context.
- **Obviously, it’s vital to avoid any portrayals that could be construed as stereotyped, caricatured, or otherwise offensive.** One important principle is to avoid singling out a feature (such as teenage pregnancy or HIV infection) as a dominant characteristic of a person or

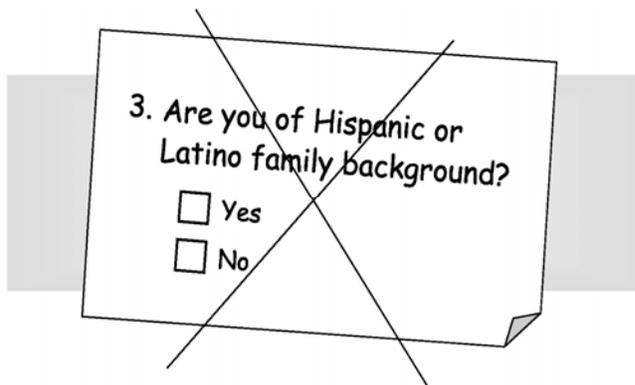
subgroup. For example, Toolkit Part 4, Chapter 3, *Guidelines for writing style*, has an example with detailed advice about how to write about disabilities in a respectful way (see Figure 4-3-i). *Practical Guidelines for the Development of Audiovisual Cancer Education Materials for African Americans* (Guidry & Larke, 1996:21) calls for eliminating stereotyped portrayals of African Americans. Examples of offensive portrayals include showing African American women in subservient roles, showing African American youths as gang members or lovers of hip-hop and rap, and emphasizing athletic prowess to the exclusion of other traits, such as being intellectual. For discussion of stereotyping, see the website called *The Provider’s Guide to Quality & Culture* at <http://erc.msh.org/qualityandculture>.

- **Use words, phrases, and examples that are part of the culture**—the language that is familiar to people. Figure 4-1-c below gives an example.

Figure

4-1-c. Asking about ethnicity in a culturally appropriate way.

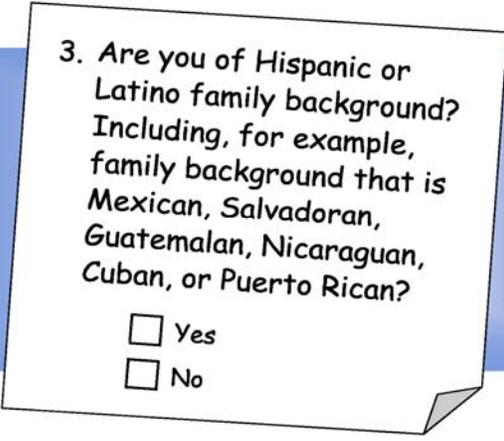
During a series of interviews done to get readers’ reactions to written materials, participants were asked to complete a one-page questionnaire that asked for demographic information. As shown below, the survey question that asked about ethnicity had to be revised.



This first version of the question about ethnicity did not work very well.

Interviewers noticed that several people who were known to be Hispanic/Latino marked “no” or skipped the question, even though they answered all the other questions, including one about race.

Interviewers learned that people were not offended by the question. They marked “no” or skipped the question simply because the words “Hispanic” and “Latino” were not the words that they use to describe themselves.



3. Are you of Hispanic or Latino family background? Including, for example, family background that is Mexican, Salvadoran, Guatemalan, Nicaraguan, Cuban, or Puerto Rican?

- Yes
 No

This revised wording worked much better, because people could relate to it personally.

The new wording reflects the diversity among the respondents. Adding the names of the countries shows awareness of and respect for the ways in which they describe themselves.



Source: Created for this Toolkit from the writer's personal experience.



Repeat new concepts and summarize the most important points



Content
Guideline
#1.4

Repeat new concepts and summarize the most important points.

All readers need time to absorb new information. Repetition helps them remember it.

To keep the text as brief as possible, writers sometimes remove text that seems to be redundant. Often this is not a good idea. Remember that readers need some time and repetition to absorb new information. You can't expect them to learn and retain something you've mentioned only once, especially if they are poor readers (Doak, Doak, & Root, 1996).

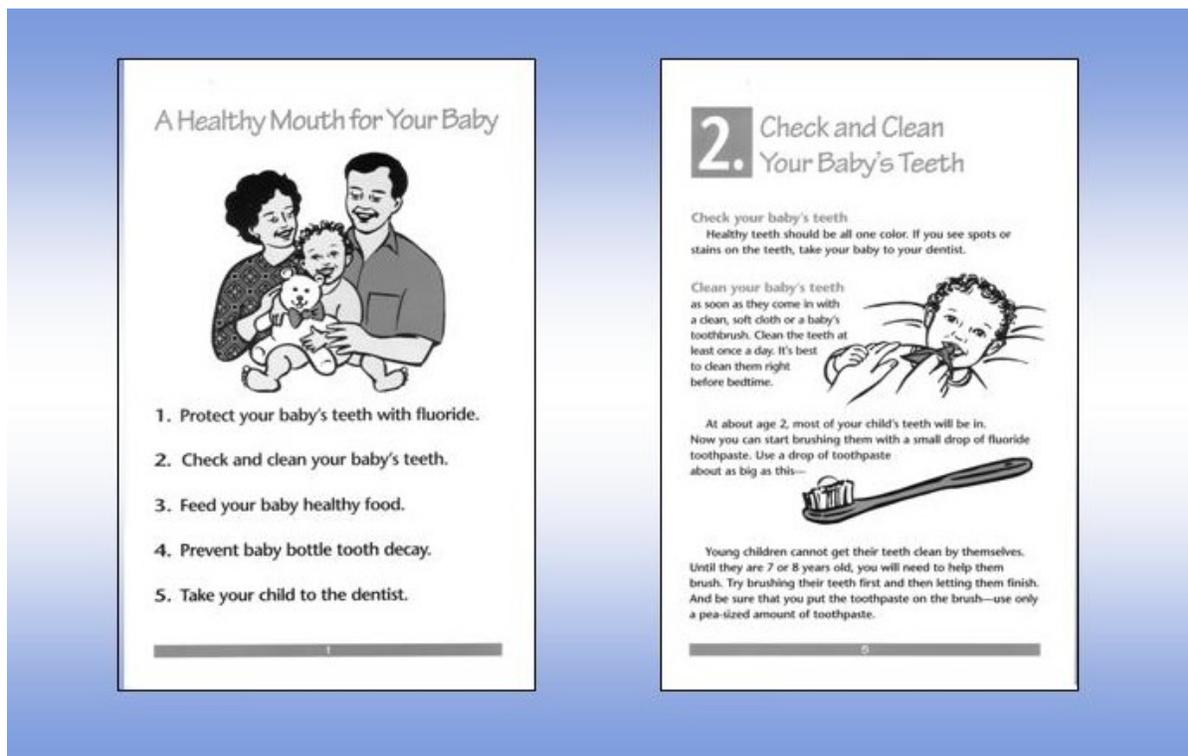
Here are some suggestions to help readers master new information and build confidence in their ability to apply it:

- **Explain important new terms and concepts in more than one way, using different words and phrases.** Don't be stingy with explanations and examples. If you don't give readers enough help to understand the new concepts, they won't be able to follow the rest of what you say.
- **Give readers time to absorb the information.** Even after you have explained a new idea, continue to include some context to help readers remember what it means.
- **Take a "just in time" approach" by repeating the explanations of new terms and concepts whenever they appear.** It's not realistic to expect people to read the material carefully from beginning to end. Many people skim and read selectively, and others skip around. So don't rely on explaining something only at the beginning. Instead, incorporate explanations and context in different parts of the material, wherever the reader may need them.
- **Summarize to reinforce the main points.** How and where you summarize depends on your purpose, your readers, and the material. For example, a summary might be very brief or more detailed. In short material it may come at the end. In longer material, there might be a summary at the beginning or end of each section. Figure 4-1-d below gives an example of a short summary on page 1 of a low literacy booklet on children's dental health. It introduces the five main points that are covered in the rest of the booklet.
- **You can use special formatting to draw attention to the main points and summary.** For example, the list of guidelines in Figure 4-1-a at the beginning of this chapter serves as a summary. The little clipboards help draw your attention to the summary list and to each guideline in the chapter. The booklet in Figure 4-1-d below uses oversize numbers to emphasize five points and the link between the summary list and the page that explains each point. Toolkit Part 5, *Understanding and using the "Toolkit Guidelines for Graphic Design"*, includes many tips on ways to highlight key points and summaries in your materials.

Figure

4-1-d. Using a summary list in an easy-to-read booklet.

The example below is two pages from different parts of a booklet written for people who have limited literacy skills.



This summary list of five main points appears on page 1. Then the next five pages explain each point.

For illustration, here is the separate page that explains point # 2.

Source: *A Healthy Mouth for Your Baby*. National Institute of Dental and Craniofacial Research, National Institutes of Health, U.S. Department of Health and Human Services, Bethesda, MD. NIH Publication No. 08-2884, reprinted July 2008. For more information, contact nohic@nidcr.nih.gov, visit <http://www.nidcr.nih.gov>, telephone (301) 402-7364, or visit the following website: <http://www.nidcr.nih.gov/OralHealth/Topics/ToothDecay/AHealthyMouthforYourBaby.htm>.

Is the content accurate and up to date?



Make sure that the information is accurate and up to date.

Check the facts. Involve subject matter experts from the beginning, and have reviewers check on accuracy. Proofread carefully at the end, not relying just on a spell-check program.

Here are some suggestions for ensuring accuracy of the information in your materials:

- **Before you start writing, be sure of your facts.** This applies to medical, scientific, and technical facts. It also applies to telephone numbers, names of organizations, street addresses, and website addresses, and similar information. If you use other studies' facts or statistics, make sure you're interpreting them accurately.
- **Involve subject matter experts at an early stage.** For example, if you are developing patient education materials, you could ask clinicians and patient educators for advice about what topics to cover and what resource materials to use. When the first draft is ready, have them review it for clinical accuracy before it goes out for broader review or testing with patients.
- **Address legal concerns.** If the material is about legal matters, or the legal department raises any concerns about the text you have written, work together with people from the legal department to resolve their concerns without sacrificing clear and simple language. For examples of ways to simplify legal language, see Figure 4-3-h in Toolkit Part 4, Chapter 3, *Guidelines for writing style*. For a detailed discussion of ways to explain patient privacy regulations in plain language, see Pritts (2005).
- **Anticipate topics that may need frequent updating, and set up procedures to handle this.** Some types of information change frequently. To keep this information accurate and useful, you need to update it periodically. With careful planning, you may be able to format the information in a way that makes updating much easier and more cost effective. For example, if you group it all in one place, you can focus your updates on a single page or two.

- **If the material includes a map or directions for getting to your location, check these carefully to make sure they are accurate and easy to follow.** It helps to ask someone who is less familiar with the area to check on maps and directions. For an example on how to format a map in the most effective ways, see *Before and After Page Design* (McWade, 2003:81).
- **Proofreading is the final step in ensuring accuracy.** Do this carefully. Spell-check programs catch certain types of errors, but they are no substitute for thorough manual proofreading:
 - Spell checkers will catch many *misspelled* words but they do not catch *misused* words. For example, a spell-checker will not flag a misuse of the word *its* that should have been *it’s* because *its* and *it’s* are both legitimate words.
 - The dictionary built into a spell checker is limited. Some words you use may be unknown to the spell checker. Spell checkers cannot spot typos in such things as people’s names, phone numbers, or websites. Nor will they catch typing errors that produce legitimate words, such as typing “no” instead of “on.”
 - Often, you will just catch a few minor errors when you proofread. Occasionally, you will catch a huge mistake that could have caused major problems – such as a typo in the toll-free help line number or an error in describing a deadline or program benefit.

How much information should you include?



Limit the information to an amount that is reasonable for the intended readers.

Too much text can be overwhelming, especially to less-skilled readers. If the material is too long, consider other ways to package it. If you condense it, don’t oversimplify or drop the examples and explanations that readers really need.

The combination of sheer amount of text and the way it is formatted makes an immediate impression on your readers. Material that is densely designed with solid blocks of text can look overwhelming,

regardless of its content. Toolkit Part 5, *Understanding and using the “Toolkit Guidelines for Graphic Design”*, will help you break your content into sections, add informative headings, and use other devices to guide readers smoothly through the text. But no matter how well text is visually displayed, readers may get discouraged or reject the material if they think it includes too much information.

Here are suggestions to help you keep the total amount of text to a reasonable amount for your intended readers:

1. **Identify what readers really “need to know,” and consider eliminating what is merely “nice to know.”** With help from key informants and people who represent your intended readers, sift through all that might be said and figure out just (and only just) what readers really need to know.
 - **Look at each part of the text closely:** Could this part stand by itself and still make sense? Could you eliminate it altogether and still have the reader take the action you urge or understand the key points of your message?
 - **Take care not to distort the meaning by oversimplifying or omitting crucial content as you pare away.** A “reasonable amount” of information means including *enough* information, but not too much. Be careful not to be too brief or terse. For example, in your quest to reduce the total amount of information, don’t cut all of your examples and explanations. You will probably find that condensing your text requires rewriting as much as cutting.
2. **Consider different options for packaging and distributing the information.** If you have many topics to cover, ask yourself if it’s wise to put them all in one comprehensive publication. The total amount of text may seem overwhelming and discourage people from finding the specific information they need.
 - **As you work on condensing the content, take into account other ways you are sharing the same or related information.** Which content must be covered in written materials and what could be covered in other ways? Often it is best to use written material in combination with other approaches, such as personal assistance from toll-free help lines or workshops, audio or video recordings, radio, and television. Can you rely on some of these other sources of information to supply the details to readers who need them?
 - **In some situations, a group of shorter, complementary pieces may be better than a single long one.** For example, you can help readers by packaging information about enrolling in a program for health services separately from information about how to use the services once enrolled. The purpose and timing are different for each type of information. Enrollment materials are for one-time use, while the information about what services are available and how to use them is for ongoing reference. Instead of putting everything into a single document, you

might devote one piece to getting signed up, and produce a follow-up piece that explains about how to get care.

3. Rely on readers’ reactions to tell you what amount of information is “reasonable.”

The ultimate test of whether you’ve kept the content to a reasonable amount is, of course, the results from testing your draft with members of the intended audience. For guidance on how to test your draft materials, see Toolkit Part 6, *How to collect and use feedback from readers*.

- **Does the material include what the readers feel they need?** Results from feedback sessions with readers will help reveal any content that is missing from the reader’s point of view.
- **Should further cuts be made?** Readers’ reactions may also suggest content that could be eliminated. For example, you might consider condensing, cutting (or maybe reformatting) parts that people tend to skip over during feedback sessions.



Does the material tell who produced it and give a publication date?



Identify the organization that produced the material, and include a publication date and contact information.

Including contact information makes it easy for readers to follow up with questions or ask for permission to reprint the material. Including the date will help remind you when it’s time to update the information.

It is good practice as well as a courtesy to readers to put the name of your organization somewhere on the written material. Where you place this identifying information, and how prominent it should be, can vary. Sometimes it’s important to feature the name of your organization up front. Other times you may want to put it at the end in smaller print, just for reference.

It’s helpful to put a publication date on all print materials, not only for reference but also to remind you about when it’s time to do revisions. You can put this date in small size print, in an unobtrusive place.

If the material has been translated from English into other languages, be sure to label the document in English. Include information about organization and date, together with the name of the language – *all written in English*. Labeling the material in English is crucial to help staff members identify and distribute the material. They may not be able to recognize the language of translation, let alone read what it says. (See guideline 12.4 in Toolkit Part 11, *Understanding and using the "Toolkit Guidelines for Translation"*.)



End notes

Thanks to Julie Carson and Mark Evers for their contributions to this chapter. For resources on health literacy and plain language, see Toolkit Part 1.

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The provider’s guide to quality & culture

Website designed to assist healthcare organizations in providing high-quality, culturally competent services; <http://erc.msh.org/qualityandculture> (accessed September 8, 2006).

To view, save, or print all or parts of this Toolkit from your personal computer, visit <http://www.cms.gov> and select Outreach & Education.

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September 2010

