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Editing Checklist for Participant Materials

Use the editing checklist that follows to improve the readability of participant materials. It was designed for project managers, research assistants, and others who may be coordinating the development of study documents. The checklist is meant as an interactive tool to both guide and track the revision process.

The Quick Reference Guide for Improving Readability on the previous page gives more detail about how to check the various items on the list. Each row on the checklist corresponds sequentially to a point in the guide. If you have any questions, feel free to contact Jessica Ridpath at 206-287-2032 or PRISM@ghc.org.

Notes for using the editing checklist

The checklist is divided into three columns. The first column is for checking off the items listed in the second column. The third column is for tracking important notes and exceptions:

- You will probably want to check some items more than once.
- It's a good idea to save completed checklists to keep track of changes and decisions.
- Track things like multi-syllable words that impact readability but sometimes cannot be avoided. Two examples are "mammography" and "immunization."
- Make note of important dates and the names of people who helped edit the document. The dates and details of decisions or any other information that the user finds helpful can also be tracked in the third column.

The checklist consists of three phases. The phases should be completed in order. The items within each phase may be checked in any order.

- In **Phase 1**, the primary reviewer (usually the project manager) checks the reading level and makes revisions to improve readability.
- In **Phase 2**, the primary reviewer checks the reading level again and asks other people to edit the document.
- In **Phase 3**, the primary reviewer confirms contact information and other details. The last steps are to get signoff from the project team and log the final reading level.

Excerpt from the PRISM Readability Toolkit, Third Edition
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Editing Checklist for Participant Materials

Study: _____ Initials of primary reviewer: _____

Document: _____Document date or version: _____

Date final version due: _____ Date due to IRB: _____

Refer to the Quick Reference Guide for Improving Readability as needed.

PHASE 1 – Primary Review		
√	**Item to be checked**	**Exceptions, Comments, and Notes**
	Reading level	
	Common, everyday words • jargon replaced or defined • examples, analogies, visual aids	
	Active voice	
	First-person	
	Sentences are short and to the point • average 15 words or less	
	Paragraphs have one main idea • lead with clear topic sentences	
	Clear and descriptive headings	

Download a free PDF of the PRISM Toolkit at
http://www.grouphealthresearch.org/capabilities/readability/readability_home.html

	Context, style, and amount of information are appropriate for the audience	
	Clear organization and format • lead with key information • use bold, bullets, or other emphasis as needed	
	Adequate white space and margins	
	Read aloud to ensure overall clarity and logical flow	Date: _____
PHASE 2 – Secondary Review		
	Reading level	
	Reviewed by others: • PI • Staff member • User • Someone unfamiliar to the project	Name: _____ Date: _____ Name: _____ Date: _____ Name: _____ Date: _____
	Proofread for typos and grammatical errors	Date: _____
PHASE 3 – Final Review		
	Names and contact information are correct	Date: _____
	Signoff from PI and/or project team	Date: _____
	Final reading level	