

# Health Plan Organizational Assessment of Health Literacy Activities



ROLLINS  
SCHOOL OF  
PUBLIC  
HEALTH



It is estimated that 50% of adult Americans lack *functional health literacy*, which the U.S. Department of Health and Human Services defines as "the degree to which individuals have the capacity to obtain, process, and understand basic health information and services needed to make appropriate health decisions." This assessment tool, developed as a collaborative effort between Emory University and America's Health Insurance Plans (AHIP), will evaluate the health literacy friendliness of health insurance plans.

**There are six different areas that are assessed:**

1. Printed Member Information
2. Web Navigation
3. Member Services/Verbal Communication
4. Forms
5. Nurse Call Line
6. Member Case/Disease Management

## Instructions

*The assessment can be found on the second tab of this document, in the bottom left corner. The tab says "Assessment" and is colored purple. When you finish reading the instructions, please click this tab to begin.*

If your organization has multiple products/plans (Medicaid, Medicare, HMO, etc), you may want to indicate for which plan you are completing the assessment. If there are significant differences between products/plans, it may be helpful to complete an individual assessment for each.

**The assessment questions are in a uniform presentation as follows:**

- Red/pink colored fields introduce new sections
- Green field contain the text of the questions
- Blue fields contain the answer choices
- Light Yellow fields contain check boxes
- Darker Yellow fields provide space to type in your answer

The information to complete the survey may come from various sources and across several departments. This assessment will take approximately **2 hours** to complete, but it may take up to **2-3 weeks** to locate and contact the appropriate people and gather the necessary information. We encourage you to work with the appropriate individuals in your health plan to complete the assessment and obtain an accurate representation of your activities.

We recommend saving this Excel file on your computer and answering the questions, but if you prefer a hard copy, it can be printed. The printed version is 25 pages. Once the assessment tool has been completed, you can compare your answers to the recommendations provided in the separate **suggestions document**. An additional **resource document** contains publicly available health literacy resources that may be helpful in developing and improving organizational health literacy efforts. To access these documents, please visit [www.ahip.org](http://www.ahip.org)

As a self-assessment document, this assessment tool should give you an idea of what your organization is currently doing to enhance health literacy, and should provide some insight into areas that may be good to focus on in the future. There is not an answer key for the tool, but rather the hope that each organization will be able to identify the areas in need of improvement during their process of continual improvement.

# Health Plan Organizational Assessment of Health Literacy Activities

To view instructions for this assessment, please view the first worksheet (instructions tab) in yellow

## Background Information

Before we start asking questions for the health literacy assessment, we would like to get some background information

### 1. Information for the primary individual responsible for completing this assessment:

Name	
Title	
Email	
Phone	
Department	
Organization	

2. For which plan/product are you completing this assessment?	<input type="checkbox"/>	Medicare
	<input type="checkbox"/>	Medicaid
	<input type="checkbox"/>	PPO
	<input type="checkbox"/>	POS
	<input type="checkbox"/>	HMO
	<input type="checkbox"/>	Other (please specify):

## Part 1: Printed Member Information

This section will assess **printed, navigational** materials that have been written and developed by your organization. **ALL** printed materials other than forms should be assessed. These include general plan information, specifics of a member's individual plan, guidelines for visits to providers and medical facilities, approved doctors and facilities, fees, formularies, etc. This section does **NOT** assess disease specific information or forms developed for the member to complete (e.g., enrollment forms).

*Some questions may have multiple answer choices that apply to your organization or department. In these situations, please choose all that apply.*

1. Does your organization have reading level guidelines for printed materials	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 1a & 1b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 1a & 1b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 1a & 1b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 1a & 1b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 2)
1a. What level?	<input type="checkbox"/>	Below Grade 5
	<input type="checkbox"/>	Grade 5-6
	<input type="checkbox"/>	Grade 7-8
	<input type="checkbox"/>	Grade 9-10
	<input type="checkbox"/>	Grade 11-12
	<input type="checkbox"/>	Above Grade 12
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):
1b. How is this reading level tested?	<input type="checkbox"/>	Readability tools
	<input type="checkbox"/>	Formal market research
	<input type="checkbox"/>	Informal assessment
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):

2. Does your organization have guidelines for font and/or size of printed materials for members?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 2a & 2b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 2a & 2b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 2a & 2b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 2a & 2b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 3)
2a. What are the font guidelines?	<input type="checkbox"/>	Serif (any)
	<input type="checkbox"/>	San-Serif (any)
	<input type="checkbox"/>	Times New Roman
	<input type="checkbox"/>	Arial
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):
2b. What are the size guidelines?	<input type="checkbox"/>	8 pt or higher
	<input type="checkbox"/>	10pt or higher
	<input type="checkbox"/>	11pt or higher
	<input type="checkbox"/>	12pt or higher
	<input type="checkbox"/>	14 pt or higher
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):

3. Does your organization have a clear language guide or set guidelines to ensure that your member information is written in simple and clear language, avoiding complicated medical and insurance jargon?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 3a & 3b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 3a & 3b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 3a & 3b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 3a & 3b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 4)
3a. How were these guidelines developed?	<input type="checkbox"/>	Member feedback
	<input type="checkbox"/>	Health literacy experts
	<input type="checkbox"/>	Formal market research
	<input type="checkbox"/>	Adapted or obtained from other organizations
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):
3b. Are print materials tested against the clear language guidelines?	<input type="checkbox"/>	Yes, materials are <u>always</u> tested against these guidelines (Go to 3c)
	<input type="checkbox"/>	Yes, materials are <u>sometimes</u> tested against these guidelines (Go to 3c)
	<input type="checkbox"/>	No, materials are not tested (Go to 4)
3c. How are the printed materials tested?	<input type="checkbox"/>	Readability tools
	<input type="checkbox"/>	Formal market research
	<input type="checkbox"/>	Member feedback
	<input type="checkbox"/>	Informal Assessment
	<input type="checkbox"/>	Other (please specify):

4. Does your organization have guidelines for the amount of white space provided in written materials to provide relief from the print?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 4a)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 4a)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 4a)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 4a)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 5)
4a. What are the specific guidelines for spacing and placement of information?		

5. Does your organization have guidelines for the use of graphics and illustrations in printed materials in a manner that enhances readability?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 5a)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 5a)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 5a)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 5a)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 6)
5a. What are the specific guidelines for testing graphics and illustrations?		

6. Are your organization's printed materials for members pilot tested specifically by individuals with limited health literacy before distribution?	<input type="checkbox"/>	Yes, materials are <u>always</u> tested by individuals with limited literacy
	<input type="checkbox"/>	Yes, materials are <u>sometimes</u> tested by individuals with limited literacy
	<input type="checkbox"/>	No, materials are not tested by individuals with limited literacy

7. Does your organization consult with people outside the organization for feedback on printed materials for your members?	<input type="checkbox"/>	Yes (Go to 7a)
	<input type="checkbox"/>	No (Go to 8)
7a. Who does your organization consult with?	<input type="checkbox"/>	Members
	<input type="checkbox"/>	Health literacy experts
	<input type="checkbox"/>	General public
	<input type="checkbox"/>	Market research
	<input type="checkbox"/>	Other (please specify):

8. Has staff in your organization received training in how to prepare written materials in plain language?	<input type="checkbox"/>	Yes (Go to 8a & 8b)
	<input type="checkbox"/>	No (Go to 9)
8a. Which type of staff receives this training?		
8b. Is training available to refresh knowledge and update staff with new information?	<input type="checkbox"/>	Yes (Go to 8c)
	<input type="checkbox"/>	No (Go to 9)
8c. How often is additional (refresher) training offered?	<input type="checkbox"/>	Every 1-3 months
	<input type="checkbox"/>	Every 4-6 months
	<input type="checkbox"/>	Every 6-11 months
	<input type="checkbox"/>	Yearly
	<input type="checkbox"/>	Every 2 years
	<input type="checkbox"/>	More than every 2 years
	<input type="checkbox"/>	Other (please specify):

9. What proportion of your organization's printed member information materials are available in languages other than English?	<input type="checkbox"/>	0% (Go to 10)
	<input type="checkbox"/>	1-25% (Go to 9a and 9b)
	<input type="checkbox"/>	26-50% (Go to 9a and 9b)
	<input type="checkbox"/>	51-75% (Go to 9a and 9b)
	<input type="checkbox"/>	76-99% (Go to 9a and 9b)
	<input type="checkbox"/>	100% (Go to 9a and 9b)
9a. Does your organization have plain languages guidelines for print materials provided in a language other than English?	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used
	<input type="checkbox"/>	Guidelines are currently being developed
	<input type="checkbox"/>	No, Guidelines do not exist for this
9b. Does your organization test these translated materials for readability in the same manner as the English print materials?	<input type="checkbox"/>	Yes, translated materials are <u>always</u> tested (Go to 9c)
	<input type="checkbox"/>	Yes, translated materials are <u>sometimes</u> tested (Go to 9c)
	<input type="checkbox"/>	No, translated materials are not tested (Go to 10)
	<input type="checkbox"/>	We do not test out English print materials (Go to 10)
9c. How does your organization test translated print materials?		

10. Is your organization's contact information, including mailing addresses and appropriate phone numbers listed on your printed member information materials?	<input type="checkbox"/>	Yes, on <u>all</u> printed materials (Go to 10a & 10b)
	<input type="checkbox"/>	Yes, on <u>some</u> printed materials (Go to 10a & 10b)
	<input type="checkbox"/>	No (Go to 11)
10a. Where is your phone number typically located on the materials?		
10b. What type of phone number is on the materials?	<input type="checkbox"/>	Toll-Free
	<input type="checkbox"/>	Local
	<input type="checkbox"/>	Both

11. Does your organization collaborate or share health literacy tools, instruments, guidelines, etc. with your provider networks?	<input type="checkbox"/>	Yes, materials are <u>always</u> shared or collaborated on with providers
	<input type="checkbox"/>	Yes, materials are <u>sometimes</u> shared or collaborated on with providers
	<input type="checkbox"/>	No, materials are not shared or collaborated on with providers

12. Does your organization use outside vendors to develop any of the member information distributed to members?	<input type="checkbox"/>	Yes (Go to 12a)
	<input type="checkbox"/>	No (You are finished with this section)
12a. Does your organization require that these vendors follow your guidelines and requirements for clear health communication?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No

## Part 2. Web Navigation

This section assesses the ease and friendliness of navigating **your organization's websites** to obtain desired information or services.

*Some questions may have multiple answer choices that apply to your organization or department. In these situations, please choose all that apply.*

1. Is your organization's web address listed on company materials?	<input type="checkbox"/>	Yes, on <u>all</u> materials (Go to 1a)
	<input type="checkbox"/>	Yes, on <u>most</u> materials (Go to 1a)
	<input type="checkbox"/>	No (Go to 2)
	<input type="checkbox"/>	Other (please specify):
1a. Where is your web address typically located on company materials?		

2. Does your organization have guidelines for font and/or size of written materials displayed on your website for members?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 2a & 2b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 2a & 2b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 2a & 2b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 2a & 2b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 3)
2a. What are the font guidelines?	<input type="checkbox"/>	Serif (any)
	<input type="checkbox"/>	San-Serif (any)
	<input type="checkbox"/>	Times New Roman
	<input type="checkbox"/>	Arial
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):
2b. What are the size guidelines?	<input type="checkbox"/>	8 pt or higher
	<input type="checkbox"/>	10pt or higher
	<input type="checkbox"/>	11pt or higher
	<input type="checkbox"/>	12pt or higher
	<input type="checkbox"/>	14 pt or higher
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):

3. Do you have guidelines to ensure that your organization's website is easy to navigate, even for people with limited health literacy and computer experience?	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used
	<input type="checkbox"/>	Guidelines are currently being developed
	<input type="checkbox"/>	No, Guidelines do not exist for this

4. Is the website assessed for ease of navigation when new information or webpages are added?	<input type="checkbox"/>	Yes, it is assessed with the addition of <u>all</u> new information
	<input type="checkbox"/>	Yes, it is assessed with the addition of <u>some</u> new information
	<input type="checkbox"/>	No, it is not assessed with the addition of new information

5. Do you gather feedback about website readability and health literacy friendliness from your members with limited health literacy and/or computer experience?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No

6. Can your website be viewed in different languages?	<input type="checkbox"/>	Yes, <u>all</u> information can be viewed in different languages (Go to 6a)
	<input type="checkbox"/>	Yes, <u>some</u> information can be viewed in different languages (Go to 6a)
	<input type="checkbox"/>	No, information can not be viewed in different languages (Go to 7)
6a. Are web sites in a language other than English tested for navigation ease with members with limited literacy skills?	<input type="checkbox"/>	Yes, websites viewed in other languages are <u>always</u> tested
	<input type="checkbox"/>	Yes, websites viewed in other languages are <u>sometimes</u> tested
	<input type="checkbox"/>	No, websites viewed in other languages are not tested

7. Is your organization's contact information, including mailing addresses and necessary phone numbers, easily accessible on your website?	<input type="checkbox"/>	Yes (Go to 7a)
	<input type="checkbox"/>	No (Go to 8)
7a. Where is contact information located on the website?	<input type="checkbox"/>	Main page on top
	<input type="checkbox"/>	Main page on bottom
	<input type="checkbox"/>	On a separate contact page
	<input type="checkbox"/>	Other (please specify):

8. Does your organization provide health and wellness information on your website?	<input type="checkbox"/>	Yes (Go to 8a & 8b)
	<input type="checkbox"/>	No (Go to 9)
8a. Are there guidelines for readability and understanding by adults with limited health literacy when developing the health and wellness information provided on your website	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used
	<input type="checkbox"/>	Guidelines are currently being developed
	<input type="checkbox"/>	No, Guidelines do not exist for this
8b. Is there a specific reading level that is met for health and wellness information?	<input type="checkbox"/>	Yes (Go to 8c & 8d)
	<input type="checkbox"/>	No (Go to 9)
8c. What level?	<input type="checkbox"/>	Below Grade 5
	<input type="checkbox"/>	Grade 5-6
	<input type="checkbox"/>	Grade 7-8
	<input type="checkbox"/>	Grade 9-10
	<input type="checkbox"/>	Grade 11-12
	<input type="checkbox"/>	Above Grade 12
	<input type="checkbox"/>	Other (please specify):
8d. How is this reading level tested?	<input type="checkbox"/>	Readability tools
	<input type="checkbox"/>	Formal market research
	<input type="checkbox"/>	Informal assessment
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):

9. Does your website explain member benefits and available services?	<input type="checkbox"/>	Yes (Go to 9a)
	<input type="checkbox"/>	No (Go to 10)
9a. Are there guidelines for readability and understanding by adults with limited health literacy when developing the descriptions of benefits and services provided on your website	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used
	<input type="checkbox"/>	Guidelines are currently being developed
	<input type="checkbox"/>	No, Guidelines do not exist for this
9b. Is there a specific reading level that is met?	<input type="checkbox"/>	Yes (Go to 9c & 9d)
	<input type="checkbox"/>	No (Go to 10)
9c. What level?	<input type="checkbox"/>	Below Grade 5
	<input type="checkbox"/>	Grade 5-6
	<input type="checkbox"/>	Grade 7-8
	<input type="checkbox"/>	Grade 9-10
	<input type="checkbox"/>	Grade 11-12
	<input type="checkbox"/>	Above Grade 12
	<input type="checkbox"/>	Other (please specify):
9d. How is this reading level tested?	<input type="checkbox"/>	Readability tools
	<input type="checkbox"/>	Formal market research
	<input type="checkbox"/>	Informal assessment
	<input type="checkbox"/>	Other (please specify):

10. Do you provide assistance for members who experience difficulties navigating your website?	<input type="checkbox"/>	Yes (Go to 10a & 10b)
	<input type="checkbox"/>	No (Go to 11)
10a. How do members experiencing difficulties access this assistance?	<input type="checkbox"/>	Phone number for online help that is prominently displayed
	<input type="checkbox"/>	FAQ/Help section
	<input type="checkbox"/>	Live online assistance
	<input type="checkbox"/>	Email question(s) to organization
	<input type="checkbox"/>	Other (please specify):
10b. Do website staff members receive training in communicating effectively with members with limited health literacy?	<input type="checkbox"/>	Yes (Go to 10c)
	<input type="checkbox"/>	No (Go to 11)
10c. What staff receives this training?	<input type="checkbox"/>	IT professionals
	<input type="checkbox"/>	Webdesigners
	<input type="checkbox"/>	Providers of content
	<input type="checkbox"/>	Other (please specify):

11. When using vendors to do web work and development, does your organization require that they follow your guidelines and requirements for clear health communication?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No

12. Has your organization used AHIP's checklist on developing better websites?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No

## Part 3. Member Services/Verbal Communication

This section assesses any **verbal** communication provided to your members, either face-to-face or over the phone, related to **member benefits**. This section does **not** assess verbal communication regarding case or disease management.

*Some questions may have multiple answer choices that apply to your organization or department. In these situations, please choose all that apply.*

1. When a member calls your organization <u>at the main</u> number listed on their member card, is there an option to speak to a live person in the first menu option?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No

2. Do you have guidelines for member services personnel for verbal communication methods that are health literacy friendly?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 2a)
	<input type="checkbox"/>	Yes (Go to 2a)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 2a)
	<input type="checkbox"/>	No (Go to 3)

2a. How were these guidelines developed?	<input type="checkbox"/>	Member feedback
	<input type="checkbox"/>	Health literacy experts
	<input type="checkbox"/>	Formal market research
	<input type="checkbox"/>	Adapted or obtained from other organizations
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):

3. Is there a guideline identifying organizational words and phrases that should be avoided or explained in plain language when communicating verbally with members?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 3a)
	<input type="checkbox"/>	Yes (Go to 3a)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 3a)
	<input type="checkbox"/>	No (Go to 4)

3a. Has your organization gone through a formal process to identify these terms?	<input type="checkbox"/>	Yes (Go to 3b)
	<input type="checkbox"/>	No (Go to 4)

3b. What does the formal process entail? Please describe.	
---	--

4. Are there guidelines regulating the use of acronyms or nicknames for departments or programs that are unique to your company when communicating with members?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	Guidelines are currently in progress
	<input type="checkbox"/>	No

5. Has your organization provided training to employees on recognition of indications that a member does not understand what is being said?	<input type="checkbox"/>	Yes (Go to 5a)
	<input type="checkbox"/>	No (Go to 6)

5a. What types of cues or indicators are included in the training that would indicate a lack of understanding in telephone communication? Please describe	
---	--

6. What percentage of your staff who interacts with your members (in a capacity other than disease management, nurse call line, or tech support) has received training on clear verbal communication techniques such as: (Go to 6a, 6b, and 6c)

6a. How to effectively organize the verbal information given to members	<input type="checkbox"/>	0%
	<input type="checkbox"/>	1-25%
	<input type="checkbox"/>	26-50%
	<input type="checkbox"/>	51-75%
	<input type="checkbox"/>	76-99%
	<input type="checkbox"/>	100%
6b. How to communicate using simple language	<input type="checkbox"/>	0%
	<input type="checkbox"/>	1-25%
	<input type="checkbox"/>	26-50%
	<input type="checkbox"/>	51-75%
	<input type="checkbox"/>	76-99%
	<input type="checkbox"/>	100%
6c. How to check for understanding	<input type="checkbox"/>	0%
	<input type="checkbox"/>	1-25%
	<input type="checkbox"/>	26-50%
	<input type="checkbox"/>	51-75%
	<input type="checkbox"/>	76-99%
	<input type="checkbox"/>	100%

## Part 4. Forms

This section assesses **forms developed by your organization**. It includes legal forms in which a member provides personal information, or authorizes or invokes a privilege or allowance, including enrollment forms, informed consent statements, and releases of information.

*Some questions may have multiple answer choices that apply to your organization or department. In these situations, please choose all that apply.*

1. Does your organization have guidelines regarding the development of forms with consideration of readability and understanding?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 1a & 1b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 1a & 1b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 1a & 1b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 1a & 1b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 2)
1a. Do you have different guidelines for different types of forms?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No
1b. What are the specific guidelines regarding the development of forms (each type if applicable)		

2. Does your organization have reading level guidelines for forms	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 2a & 2b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 2a & 2b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 2a & 2b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 2a & 2b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 3)
2a. What level?	<input type="checkbox"/>	Below Grade 5
	<input type="checkbox"/>	Grade 5-6
	<input type="checkbox"/>	Grade 7-8
	<input type="checkbox"/>	Grade 9-10
	<input type="checkbox"/>	Grade 11-12
	<input type="checkbox"/>	Above Grade 12
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):
2b. How is this reading level tested?	<input type="checkbox"/>	Readability tools
	<input type="checkbox"/>	Formal market research
	<input type="checkbox"/>	Informal assessment
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):

3. Does your organization have guidelines for font and/or size of printed materials for members?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 3a & 3b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 3a & 3b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 3a & 3b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 3a & 3b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 4)
3a. What are the font guidelines?	<input type="checkbox"/>	Serif (any)
	<input type="checkbox"/>	San-Serif (any)
	<input type="checkbox"/>	Times New Roman
	<input type="checkbox"/>	Arial
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):
3b. What are the size guidelines?	<input type="checkbox"/>	8 pt or higher
	<input type="checkbox"/>	10pt or higher
	<input type="checkbox"/>	11pt or higher
	<input type="checkbox"/>	12pt or higher
	<input type="checkbox"/>	14 pt or higher
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):

4. Do you have a clear language guide or set guidelines to ensure that your forms written in simple and clear language, avoiding complicated medical and insurance jargon?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 4a & 4b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 4a & 4b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 4a & 4b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 4a & 4b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 5)
4a. How were these guidelines developed?	<input type="checkbox"/>	Member feedback
	<input type="checkbox"/>	Health literacy experts
	<input type="checkbox"/>	Formal market research
	<input type="checkbox"/>	Adapted or obtained from other organizations
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):
4b. Are print materials tested against the clear language guidelines?	<input type="checkbox"/>	Yes, print materials are <u>always</u> tested (Go to 4c)
	<input type="checkbox"/>	Yes, print materials are <u>sometimes</u> tested (Go to 4c)
	<input type="checkbox"/>	No (Go to 5)
4c. How are the printed materials tested?	<input type="checkbox"/>	Readability tools
	<input type="checkbox"/>	Formal market research
	<input type="checkbox"/>	Member feedback
	<input type="checkbox"/>	Informal Assessment
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):

5. Does your organization have guidelines for the amount of white space provided in your forms to provide relief from the print?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 5a)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 5a)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 5a)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 5a)
	<input type="checkbox"/>	No, Guidelines do not exist for this (You are finished with this section)
5a. What are the specific guidelines for spacing and placement of information?		

6. Does your organization use outside vendors to develop any of the forms distributed to members?	<input type="checkbox"/>	Yes (Go to 6a)
	<input type="checkbox"/>	No (You are finished with this section)
6a. Does your organization require that these vendors follow your guidelines and requirements for clear health communication?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No

## Part 5. Nurse Call Line

This section assesses any insurance-provided **nurse call line** established to answer **specific, individual medical questions**. This section does **NOT** assess member disease management. The employees and information guidelines referred to are only those directly related to the provision of services on the nurse call line.

*Some questions may have multiple answer choices that apply to your organization or department. In these situations, please choose all that apply.*

1. Is there a guideline for identifying medical and scientific jargon that should be avoided when discussing health information with members?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 1a)
	<input type="checkbox"/>	Yes (Go to 1a)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 1a)
	<input type="checkbox"/>	No (Go to 2)
1a. Has your organization gone through a formal process to identify these terms?	<input type="checkbox"/>	Yes (Go to 1b)
	<input type="checkbox"/>	No (Go to 2)
1b. What does the formal process entail? Please describe		

2. Are there guidelines regulating the use of acronyms or nicknames for departments or programs that are unique to your company when communicating with members?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	Guidelines are currently being developed
	<input type="checkbox"/>	No

3. Do you schedule appointments or phone calls so that members have enough time to ask questions or take extra time to understand the information provided?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No

4. Do you provide members with contact information in the event that they have questions or confusion after the interaction?	<input type="checkbox"/>	Yes (Go to 4a)
	<input type="checkbox"/>	No (Go to 5)
4a. Whose contact information do they receive?	<input type="checkbox"/>	The original person the member spoke to
	<input type="checkbox"/>	The general nurse call line number
	<input type="checkbox"/>	Supervisor or head of the department
	<input type="checkbox"/>	Other (please specify):

5. Has your organization provided training to employees of the nurse call line on recognition of indications that a member does not understand what is being said?	<input type="checkbox"/>	Yes (Go to 5a)
	<input type="checkbox"/>	No (Go to 6)
5a. What types of cues or indicators are included in the training that would indicate a lack of understanding in telephone communication? Please describe		

6. What percentage of your nurse call line staff who interacts with your members has received training on clear verbal communication techniques such as: (Go to 6a, 6b, and 6c)

6a. How to effectively organize the verbal information given to clients	<input type="checkbox"/>	0%
	<input type="checkbox"/>	1-25%
	<input type="checkbox"/>	26-50%
	<input type="checkbox"/>	51-75%
	<input type="checkbox"/>	76-99%
	<input type="checkbox"/>	100%
6b. How to communicate using simple language	<input type="checkbox"/>	0%
	<input type="checkbox"/>	1-25%
	<input type="checkbox"/>	26-50%
	<input type="checkbox"/>	51-75%
	<input type="checkbox"/>	76-99%
	<input type="checkbox"/>	100%
6c. How to check for understanding	<input type="checkbox"/>	0%
	<input type="checkbox"/>	1-25%
	<input type="checkbox"/>	26-50%
	<input type="checkbox"/>	51-75%
	<input type="checkbox"/>	76-99%
	<input type="checkbox"/>	100%

## Part 6. Case/Disease Management

This section assesses **general information** provided to members, both printed and verbal, that pertains to their personal **disease and wellness**. Assessment of printed disease management information only applies to that which is developed by your company.

*Some questions may have multiple answer choices that apply to your organization or department. In these situations, please choose all that apply.*

Some organizations may separate the development of case management and disease management materials and guidelines. For example, you may have disease management materials developed externally, while case management materials are developed within your organization. If you would like to assess these categories separately, please select which category you are evaluating below. A duplicate section is available immediately following this one in which you may complete the other category. If you do not wish to separate Case and Disease management, please choose both.

<input type="checkbox"/>	Case Management
<input type="checkbox"/>	Disease Management

1. Does your organization have reading level guidelines for printed case/disease management materials	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 1a & 1b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 1a & 1b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 1a & 1b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 1a & 1b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 2)

1a. What level?	<input type="checkbox"/>	Below Grade 5
	<input type="checkbox"/>	Grade 5-6
	<input type="checkbox"/>	Grade 7-8
	<input type="checkbox"/>	Grade 9-10
	<input type="checkbox"/>	Grade 11-12
	<input type="checkbox"/>	Above Grade 12
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):

1b. How is this reading level tested?	<input type="checkbox"/>	Readability tools
	<input type="checkbox"/>	Formal market research
	<input type="checkbox"/>	Informal assessment
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):

2. Does your organization have guidelines for font and/or size of printed case/disease management materials for members?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 2a & 2b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 2a & 2b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 2a & 2b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 2a & 2b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 3)
2a. What are the font guidelines?	<input type="checkbox"/>	Serif (any)
	<input type="checkbox"/>	San-Serif (any)
	<input type="checkbox"/>	Times New Roman
	<input type="checkbox"/>	Arial
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):
2b. What are the size guidelines?	<input type="checkbox"/>	8 pt or higher
	<input type="checkbox"/>	10pt or higher
	<input type="checkbox"/>	11pt or higher
	<input type="checkbox"/>	12pt or higher
	<input type="checkbox"/>	14 pt or higher
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):

3. Does your organization have a clear language guide or set guidelines to ensure that case/disease management materials are written in simple and clear language, avoiding complicated medical and insurance jargon?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 3a & 3b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 3a & 3b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 3a & 3b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 3a & 3b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 4)
3a. How were these guidelines developed?	<input type="checkbox"/>	Member feedback
	<input type="checkbox"/>	Health literacy experts
	<input type="checkbox"/>	Formal Market Research
	<input type="checkbox"/>	Adapted or obtained from other organizations
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):
3b. Are these guidelines tested?	<input type="checkbox"/>	Yes, materials are <u>always</u> tested against these guidelines (Go to 3c)
	<input type="checkbox"/>	Yes, materials are <u>sometimes</u> tested against these guidelines (Go to 3c)
	<input type="checkbox"/>	No, materials are not tested (Go to 4)
3c. How are these guidelines tested?	<input type="checkbox"/>	Readability tools
	<input type="checkbox"/>	Formal market research
	<input type="checkbox"/>	Member feedback
	<input type="checkbox"/>	Informal Assessment
	<input type="checkbox"/>	Other (please specify):

4. Does your organization have guidelines for the amount of white space provided in case/disease management materials to provide relief from the print?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 4a)
	<input type="checkbox"/>	Yes, Guidelines Exist and are <u>always</u> used (Go to 4a)
	<input type="checkbox"/>	Yes, Guidelines Exist and are <u>sometimes</u> used (Go to 4a)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 4a)
	<input type="checkbox"/>	No (Go to 5)
4a. What are the specific guidelines for spacing and placement of information?		

5. Does your organization have guidelines for the use of graphics and illustrations in case/disease management materials in a manner that enhances readability?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 5a)
	<input type="checkbox"/>	Yes, Guidelines Exist and are <u>always used</u> (Go to 5a)
	<input type="checkbox"/>	Yes, Guidelines Exist and are <u>sometimes used</u> (Go to 5a)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 5a)
	<input type="checkbox"/>	No (Go to 6)
5a. What are the specific guidelines for testing graphics and illustrations?		

6. Are your organization's printed case/disease management materials pilot tested by individuals with limited health literacy before distribution?	<input type="checkbox"/>	Yes, materials are <u>always</u> tested by individuals with limited literacy
	<input type="checkbox"/>	Yes, materials are <u>sometimes</u> tested by individuals with limited literacy
	<input type="checkbox"/>	No, materials are not tested by individuals with limited literacy

7. Does your organization consult with people outside the organization for feedback on case/disease management materials?	<input type="checkbox"/>	Yes (Go to 7a)
	<input type="checkbox"/>	No (Go to 8)
7a. Who does your organization consult with?	<input type="checkbox"/>	Members
	<input type="checkbox"/>	Health literacy experts
	<input type="checkbox"/>	General public/Market research
	<input type="checkbox"/>	Other (please specify):

8. Has staff in your organization received training in how to prepare case/disease management materials in plain language?	<input type="checkbox"/>	Yes (Go to 8a & 8b)
	<input type="checkbox"/>	No (Go to 9)
8a. Which type of staff receives this training?		
8b. Is training available to refresh knowledge and update staff with new information?	<input type="checkbox"/>	Yes (Go to 8c)
	<input type="checkbox"/>	No (Go to 9)
8c. How often is additional (refresher) training offered?	<input type="checkbox"/>	Every 1-3 months
	<input type="checkbox"/>	Every 4-6 months
	<input type="checkbox"/>	Every 6-11 months
	<input type="checkbox"/>	Yearly
	<input type="checkbox"/>	Every 2 years
	<input type="checkbox"/>	More than every 2 years
	<input type="checkbox"/>	Other (please specify):

9. What proportion of your organization's printed case/disease management materials are available in languages other than English?	<input type="checkbox"/>	0% (Go to 10)
	<input type="checkbox"/>	1-25% (Go to 9a and 9b)
	<input type="checkbox"/>	26-50% (Go to 9a and 9b)
	<input type="checkbox"/>	51-75% (Go to 9a and 9b)
	<input type="checkbox"/>	76-99% (Go to 9a and 9b)
	<input type="checkbox"/>	100% (Go to 9a and 9b)
9a. Does your organization have plain languages guidelines for print materials provided in a language other than English?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used
	<input type="checkbox"/>	Guidelines are currently being developed
	<input type="checkbox"/>	No, Guidelines do not exist for this
9b. Does your organization test these translated materials for readability in the same manner as the English print materials?	<input type="checkbox"/>	Yes, translated materials are <u>always</u> tested (Go to 9c)
	<input type="checkbox"/>	Yes, translated materials are <u>sometimes</u> tested (Go to 9c)
	<input type="checkbox"/>	No, translated materials are not tested (Go to 10)
	<input type="checkbox"/>	We do not test out English print materials (Go to 10)
9c. How does your organization test translated print materials?		

10. Is there a guideline for identifying medical and scientific jargon that should be avoided when discussing health information verbally with members?	<input type="checkbox"/>	Yes (Go to 10a)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 10a)
	<input type="checkbox"/>	No (Go to 11)
10a. Has your organization gone through a formal process to identify these terms?	<input type="checkbox"/>	Yes (Go to 10b)
	<input type="checkbox"/>	No (Go to 11)
10b. What does the formal process entail? Please describe.		

11. Do you schedule appointments or phone calls so that members have enough time to ask questions or take extra time to understand the information provided?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No

12. Do you provide members with contact information in the event that they have questions or confusion after the interaction?	<input type="checkbox"/>	Yes (Go to 12a)
	<input type="checkbox"/>	No (Go to 13)
12a. Whose contact information do they receive?	<input type="checkbox"/>	The original person the member spoke to
	<input type="checkbox"/>	The general nurse call line number
	<input type="checkbox"/>	Supervisor or head of the department
	<input type="checkbox"/>	Other (please specify):

13. Has your organization provided training to employees communicating with members about case/disease management of indications that a member does not understand what is being said?	<input type="checkbox"/>	Yes (Go to 13a)
	<input type="checkbox"/>	No (Go to 14)
13a. What types of cues or indicators are included in the training that would indicate a lack of understanding in telephone communication? Please describe		

14. What percentage of your employees that communicate about case/disease management have received training on clear verbal communication techniques such as: (Go to 14a, 14b, and 14c)		
14a. How to effectively organize the verbal information given to clients	<input type="checkbox"/>	0%
	<input type="checkbox"/>	1-25%
	<input type="checkbox"/>	26-50%
	<input type="checkbox"/>	51-75%
	<input type="checkbox"/>	76-99%
	<input type="checkbox"/>	100%
14b. How to communicate using simple language	<input type="checkbox"/>	0%
	<input type="checkbox"/>	1-25%
	<input type="checkbox"/>	26-50%
	<input type="checkbox"/>	51-75%
	<input type="checkbox"/>	76-99%
	<input type="checkbox"/>	100%
14c. How to check for understanding	<input type="checkbox"/>	0%
	<input type="checkbox"/>	1-25%
	<input type="checkbox"/>	26-50%
	<input type="checkbox"/>	51-75%
	<input type="checkbox"/>	76-99%
	<input type="checkbox"/>	100%

15. Does your organization use outside vendors to develop any of the case/disease management materials distributed to members?	<input type="checkbox"/>	Yes (Go to 15a)
	<input type="checkbox"/>	No (You are finished with this section)
15a. Does your organization require that these vendors follow your guidelines and requirements for clear health communication?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No

## Part 6. Case/Disease Management (Supplemental Section)

This section assesses **general information** provided to members, both printed and verbal, that pertains to their personal **disease and wellness**. Assessment of printed disease management information only applies to that which is developed by your company.

*Some questions may have multiple answer choices that apply to your organization or department. In these situations, please choose all that apply.*

Some organizations may separate the development of case management and disease management materials and guidelines. For example, you may have disease management materials developed externally, while case management materials are developed within your organization. If you would like to assess these categories separately, please select which category you are evaluating below. A duplicate section is available immediately following this one in which you may complete the other category. If you do not wish to separate Case and Disease management, please choose both.

<input type="checkbox"/>	Case Management
<input type="checkbox"/>	Disease Management

1. Does your organization have reading level guidelines for printed case/disease management materials	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 1a & 1b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 1a & 1b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 1a & 1b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 1a & 1b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 2)
1a. What level?	<input type="checkbox"/>	Below Grade 5
	<input type="checkbox"/>	Grade 5-6
	<input type="checkbox"/>	Grade 7-8
	<input type="checkbox"/>	Grade 9-10
	<input type="checkbox"/>	Grade 11-12
	<input type="checkbox"/>	Above Grade 12
	<input type="checkbox"/>	Not Applicable
<input type="checkbox"/>	Other (please specify):	
1b. How is this reading level tested?	<input type="checkbox"/>	Readability tools
	<input type="checkbox"/>	Formal market research
	<input type="checkbox"/>	Informal assessment
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):

2. Does your organization have guidelines for font and/or size of printed case/disease management materials for members?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 2a & 2b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 2a & 2b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 2a & 2b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 2a & 2b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 3)
2a. What are the font guidelines?	<input type="checkbox"/>	Serif (any)
	<input type="checkbox"/>	San-Serif (any)
	<input type="checkbox"/>	Times New Roman
	<input type="checkbox"/>	Arial
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):
2b. What are the size guidelines?	<input type="checkbox"/>	8 pt or higher
	<input type="checkbox"/>	10pt or higher
	<input type="checkbox"/>	11pt or higher
	<input type="checkbox"/>	12pt or higher
	<input type="checkbox"/>	14 pt or higher
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):

3. Does your organization have a clear language guide or set guidelines to ensure that case/disease management materials are written in simple and clear language, avoiding complicated medical and insurance jargon?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 3a & 3b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used (Go to 3a & 3b)
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used (Go to 3a & 3b)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 3a & 3b)
	<input type="checkbox"/>	No, Guidelines do not exist for this (Go to 4)
3a. How were these guidelines developed?	<input type="checkbox"/>	Member feedback
	<input type="checkbox"/>	Health literacy experts
	<input type="checkbox"/>	Formal Market Research
	<input type="checkbox"/>	Adapted or obtained from other organizations
	<input type="checkbox"/>	Not Applicable
	<input type="checkbox"/>	Other (please specify):
3b. Are these guidelines tested?	<input type="checkbox"/>	Yes, materials are <u>always</u> tested against these guidelines (Go to 3c)
	<input type="checkbox"/>	Yes, materials are <u>sometimes</u> tested against these guidelines (Go to 3c)
	<input type="checkbox"/>	No, materials are not tested (Go to 4)
3c. How are these guidelines tested?	<input type="checkbox"/>	Readability tools
	<input type="checkbox"/>	Formal market research
	<input type="checkbox"/>	Member feedback
	<input type="checkbox"/>	Informal Assessment
	<input type="checkbox"/>	Other (please specify):

4. Does your organization have guidelines for the amount of white space provided in case/disease management materials to provide relief from the print?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 4a & 4b)
	<input type="checkbox"/>	Yes, Guidelines Exist and are <u>always</u> used (Go to 4a)
	<input type="checkbox"/>	Yes, Guidelines Exist and are <u>sometimes</u> used (Go to 4a)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 4a)
	<input type="checkbox"/>	No (Go to 5)
4a. What are the specific guidelines for spacing and placement of information?		

5. Does your organization have guidelines for the use of graphics and illustrations in case/disease management materials in a manner that enhances readability?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency (Go to 5a)
	<input type="checkbox"/>	Yes, Guidelines Exist and are <u>always</u> used (Go to 5a)
	<input type="checkbox"/>	Yes, Guidelines Exist and are <u>sometimes</u> used (Go to 5a)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 5a)
	<input type="checkbox"/>	No (Go to 6)
5a. What are the specific guidelines for testing graphics and illustrations?		

6. Are your organization's printed case/disease management materials pilot tested by individuals with limited health literacy before distribution?	<input type="checkbox"/>	Yes, materials are <u>always</u> tested by individuals with limited literacy
	<input type="checkbox"/>	Yes, materials are <u>sometimes</u> tested by individuals with limited literacy
	<input type="checkbox"/>	No, materials are not tested by individuals with limited literacy

7. Does your organization consult with people outside the organization for feedback on case/disease management materials?	<input type="checkbox"/>	Yes (Go to 7a)
	<input type="checkbox"/>	No (Go to 8)
7a. Who does your organization consult with?	<input type="checkbox"/>	Members
	<input type="checkbox"/>	Health literacy experts
	<input type="checkbox"/>	General public/Market research
	<input type="checkbox"/>	Other (please specify):

8. Has staff in your organization received training in how to prepare case/disease management materials in plain language?	<input type="checkbox"/>	Yes (Go to 8a & 8b)
	<input type="checkbox"/>	No (Go to 9)
8a. Which type of staff receives this training?		
8b. Is training available to refresh knowledge and update staff with new information?	<input type="checkbox"/>	Yes (Go to 8c)
	<input type="checkbox"/>	No (Go to 9)
8c. How often is additional (refresher) training offered?	<input type="checkbox"/>	Every 1-3 months
	<input type="checkbox"/>	Every 4-6 months
	<input type="checkbox"/>	Every 6-11 months
	<input type="checkbox"/>	Yearly
	<input type="checkbox"/>	Every 2 years
	<input type="checkbox"/>	More than every 2 years
	<input type="checkbox"/>	Other (please specify):

9. What proportion of your organization's printed case/disease management materials are available in languages other than English?	<input type="checkbox"/>	0% (Go to 10)
	<input type="checkbox"/>	1-25% (Go to 9a and 9b)
	<input type="checkbox"/>	26-50% (Go to 9a and 9b)
	<input type="checkbox"/>	51-75% (Go to 9a and 9b)
	<input type="checkbox"/>	76-99% (Go to 9a and 9b)
	<input type="checkbox"/>	100% (Go to 9a and 9b)
9a. Does your organization have plain languages guidelines for print materials provided in a language other than English?	<input type="checkbox"/>	Yes, Guidelines/requirements are imposed by governmental or other agency
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>always</u> used
	<input type="checkbox"/>	Yes, Guidelines exist and are <u>sometimes</u> used
	<input type="checkbox"/>	Guidelines are currently being developed
	<input type="checkbox"/>	No, Guidelines do not exist for this
9b. Does your organization test these translated materials for readability in the same manner as the English print materials?	<input type="checkbox"/>	Yes, translated materials are <u>always</u> tested (Go to 9c)
	<input type="checkbox"/>	Yes, translated materials are <u>sometimes</u> tested (Go to 9c)
	<input type="checkbox"/>	No, translated materials are not tested (Go to 10)
	<input type="checkbox"/>	We do not test out English print materials (Go to 10)
9c. How does your organization test translated print materials?		

10. Is there a guideline for identifying medical and scientific jargon that should be avoided when discussing health information verbally with members?	<input type="checkbox"/>	Yes (Go to 10a)
	<input type="checkbox"/>	Guidelines are currently being developed (Go to 10a)
	<input type="checkbox"/>	No (Go to 11)
10a. Has your organization gone through a formal process to identify these terms?	<input type="checkbox"/>	Yes (Go to 10b)
	<input type="checkbox"/>	No (Go to 11)
10b. What does the formal process entail? Please describe.		

11. Do you schedule appointments or phone calls so that members have enough time to ask questions or take extra time to understand the information provided?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No

12. Do you provide members with contact information in the event that they have questions or confusion after the interaction?	<input type="checkbox"/>	Yes (Go to 12a)
	<input type="checkbox"/>	No (Go to 13)
12a. Whose contact information do they receive?	<input type="checkbox"/>	The original person the member spoke to
	<input type="checkbox"/>	The general nurse call line number
	<input type="checkbox"/>	Supervisor or head of the department
	<input type="checkbox"/>	Other (please specify):

13. Has your organization provided training to employees communicating with members about case/disease management of indications that a member does not understand what is being said?	<input type="checkbox"/>	Yes (Go to 13a)
	<input type="checkbox"/>	No (Go to 14)
13a. What types of cues or indicators are included in the training that would indicate a lack of understanding in telephone communication? Please describe		

14. What percentage of your employees that communicate about case/disease management have received training on clear verbal communication techniques such as: (Go to 14a, 14b, and 14c)		
14a. How to effectively organize the verbal information given to clients	<input type="checkbox"/>	0%
	<input type="checkbox"/>	1-25%
	<input type="checkbox"/>	26-50%
	<input type="checkbox"/>	51-75%
	<input type="checkbox"/>	76-99%
	<input type="checkbox"/>	100%
14b. How to communicate using simple language	<input type="checkbox"/>	0%
	<input type="checkbox"/>	1-25%
	<input type="checkbox"/>	26-50%
	<input type="checkbox"/>	51-75%
	<input type="checkbox"/>	76-99%
	<input type="checkbox"/>	100%
14c. How to check for understanding	<input type="checkbox"/>	0%
	<input type="checkbox"/>	1-25%
	<input type="checkbox"/>	26-50%
	<input type="checkbox"/>	51-75%
	<input type="checkbox"/>	76-99%
	<input type="checkbox"/>	100%

15. Does your organization use outside vendors to develop any of the case/disease management materials distributed to members?	<input type="checkbox"/>	Yes (Go to 15a)
	<input type="checkbox"/>	No (You are finished with this section)
15a. Does your organization require that these vendors follow your guidelines and requirements for clear health communication?	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No