

ACTIVE

Question by Question Specifications Guide for Administration of the Individual Assessment Part II (10th Annual Post-Test) Measurements

I. Purpose

The measures in the Individual Assessment Part II (10th Annual Post-Test) are designed to measure aspects of the subject's functional status, speed of processing, mobility, and health status. The results of the measures completed at this visit will be compared to results obtained at earlier points in the study.

II. Study Sample and Administration

10th Annual Post-Testing will be completed on all ACTIVE subjects still participating in the study. The ideal order of administration of these 10th Annual Post-Test Measures is as follows:

1. Individual Assessment Part I
2. Take-Home Questionnaire
3. Individual Assessment Part II
4. Group Assessment Measures

However, this order is not strict. You may need to alter the order of administration to accommodate either subject or Field Site scheduling conflicts.

III. Administration Protocol

The following items should be assembled in advance of the subject's appointment time.

A. Materials

- Individual Assessment Part II (10th Annual Post-Test) Form #815 with ID label attached
- Digit Symbol Substitution & Digit Symbol Copy Form #411a with ID label attached
- Digit Symbol Substitution & Digit Symbol Copy Data Coding Form #411 with ID label attached
- ACTIVE Blood Pressure and Pulse Reporting Form
- OTDL Data Form #422 with ID label attached
- QxQ Specifications Guide for Administration of the OTDL
- QxQ Specifications Guide for Administration of the Individual Assessment Part II (10th Annual Post-Test)

B. Equipment

- Omron Automatic Digital Blood Pressure and Pulse Monitor
- Two OMRON blood pressure cuffs: standard and large adult sizes
- Right angle Handi-Stat wood piece
- 8 foot wood folding carpenter's ruler
- Luekopor medical paper tape
- Large digital display scale with extra wide base
- Germicidal handi-wipes
- Paper towels
- Jamar Adjustable Hydraulic hand dynamometer
- Electronic timer
- Digital stopwatch
- Timed IADL Administration Kit
- OTDL Administration Kit
- Spare batteries should be carried for all battery operated equipment
- Digit Symbol Substitution Task Scoring Stencil

C. Preparation

1. Testers must be certified as an ACTIVE Tester. Certification status must be current.
2. Ideally, all Individual Assessment Part II Measurements can be completed in one general exam room or private workstation. The area selected must allow for private, confidential testing and interviewing with minimal background noise.
 - To complete the height measurement, a wall space or door jam space without baseboard or threshold is required. The floor must be free of carpeting.
 - To complete the weight measurement, a hard, flat, uncarpeted floor space large enough to accommodate the digital scale will be required.
3. In advance of the subject's appointment time, testers should assemble a packet with all forms necessary for completion of the Individual Assessment Part II (10th Annual Post-Test) Measurements. All forms should be pre-labeled with the subject's full study ID Labels.
4. Prior to the start of measurement, the tester must remove phone book, digital stopwatch, coins, the three food cans, and the two medicine containers from the Timed IADL kit. Close up the kit so the food array in the box is not visible to the subject.
5. Prior to the start of the session, the tester should remove items and question cards from the OTDL Kit. Organize items in precise order of use for testing.
6. When you greet the subject, note clothing compatibility for the blood pressure measurement. If the shirt or sweater seems to be incompatible, ask the subject to change shirts.

IV. Important Matters related to Standardization of the Data Collection Methods

Whenever many individuals are responsible for data collection, the possibility of observer bias exists. Simply put, this means that differences in the technique used to collect the data can be responsible for variations in the results. Observer bias can also occur in the collection of physiologic measures if a different technique is used or simply by being casual or unfamiliar with the protocol.

A great deal of time and effort has been spent developing protocols that accurately measure physical and functional capabilities. Each protocol has been written with the principles of accuracy, consistency, safety and comfort in mind. It is essential that **ALL TESTERS SHOULD ADHERE TO THE PROTOCOLS AS WRITTEN**, since even a seemingly unimportant omission or variation in technique can make a significant difference in the measurements recorded.

There will be times when a deviation from the protocol is necessary and unavoidable. An example would be the man who has broken his left arm and must have his blood pressure taken on the right arm; or the woman who is physically unable to position her head against the wall for the height measurement. When these situations occur, use the margins of the form to record the measurements as taken and note the variation in the technique used for the measurement and the reasons for the deviation from protocol.

V. Section by Section Review

Section A. Identifying Information

Items A1. – A4. should be completed by the ACTIVE tester prior to the start of the measurement.

- A1.** Study ID: Affix the subject's study ID label in the space provided. Do not hand write the ID number. Double-check the ID number against the subject's visit control sheet. Confirm the subject's name at the start of measurement to be sure you are using the correct ID for the subject.
- A2.** Visit #: This item may be pre-coded. Various forms will be used at the time of the Individual Assessment Part II (10th Annual Post-Test) (Visit # **ID10**). The code for Individual Assessment Part II (10th Annual Post-Test) is **ID10**.
- A3.** Form Version: Be sure the form version on the form matches the current approved version. Note the year appears as a 4-digit number.
- A4.** Tester ID/Initials: Write in your assigned tester ID or initials.
- A5.** Date completed: Write in the date you complete the Individual Assessment Part II (10th Annual Post-Test) Measurements; if the measures are completed in more than one day, use the date the measures were completed. Record the date as month, day and year. Note the year must be recorded as a four digit number; e.g., 2008. Do not leave blank spaces; use leading zeros as required.
- A6.** Time started: Record the exact time you begin the General Introduction to the Individual Assessment Part II (10th Annual Post-Test) in A6. Use a 12-hour clock; circle **AM** or **PM** as appropriate.

Section C. Timed IADL

1. Description

The phenomenon of age-related slowing is the best documented and least contested of any in the field of aging and cognition. The Timed IADL task consists of five common activities of daily living, all of which involve searching for, and processing information regarding, target objects or information. All activities are timed to facilitate a measurement of the speed of information processing and visual search while engaging in these everyday activities.

The measures are designed to assess the effects of the cognitive interventions on functional outcomes. The five simple tasks are basic to activities of daily living and are easily amenable to being timed. They come from the domains of telephone communication, shopping, financial abilities, medication usage, and nutrition evaluation. The brevity of the tasks, and the ease with which they can be standardized across sites, and used in repeated testing situations, were important considerations in their choice.

2. Materials needed

All items needed for the administration of the Timed IADLs are packaged in a container suitable for carrying. This kit includes:

- Phone book (Timed IADL Task A)
- Coins (3 quarters, 4 dimes, 3 nickels, & 4 pennies) (Timed IADL Task B)
- Three cans of food (Timed IADL Task C)
- Array of food items (Timed IADL Task D)
- Two medicine containers (Timed IADL Task E)
- Digital stopwatch (All Timed IADLs)

3. Administration

This guide provides background information on, and procedural details relevant to, the 5 Timed IADL tasks. Testers administering this assessment must master this protocol. Since performance on these activities is timed, the tester should ensure that the subject is focused on the task at hand.

The time taken to perform an activity should be recorded from the stopwatch in the following format: minutes: seconds: hundredths of seconds. For example, a task taking one minute thirty two and forty eight hundredths seconds would be simply recorded as 1:32:48 in the appropriate space.

NOTES AND CAUTION:

- Since all five tasks involve the use of near vision, and some involve reading small print, make sure that the subject is wearing the optical correction (reading glasses) that they typically wear for near vision activities prior to the start of the Timed IADL tasks.
- Always check to ensure that the digital stopwatch has been reset to zero and starts properly at the start of timing each of the Timed IADL activities. If it hasn't, you must start the task over again. Be sure to have the timer ready before starting each activity.
- Since the correct answers are on your data form, make sure that the subject cannot see your data form at any time during testing.

Task A Finding a Telephone Number

Description of task

The subject is instructed that s/he will be given a name of an individual whose number s/he should look up in the phone book and say aloud. For example, at this assessment, the subject is given the name Steven N. Nelson (the tester then spells out the full name). The subject, to ensure comprehension, is asked to repeat the name for which he/she will be searching. The subject is handed the phone book and when the subject opens the book, start the timer. The timer is stopped when the subject finds the number and says it aloud. There is a time limit of 3 minutes.

Instrumentation

- Phone book (included in the Timed IADL Kit);
- Digital stopwatch.

Multiple copies of an identical, real phone book (Birmingham, AL 2008) have been provided to each of the ACTIVE Field Sites. Multiple copies will be provided since the phone book will need to be replaced periodically because of the wear and tear associated with heavy use in testing.

Procedure

To eliminate any memory effects and reduce wear and tear on specific pages of the phone book, the subject will be asked to lookup different names during different assessments. All the names are from the middle portion of the phone book, contain a middle initial, and are not found at the beginning of a page, column, or surname listing.

Watch subject do the task. If s/he asks what the name was, give the target name again, spelling it out if necessary. If the subject has questions relating to alphabetical order, do not give help, just restate the target name. (Allowable prompts: target name only).

Task B Making change

Description of task

The subject is told to count out 67 cents in change and place it on the table. The subject is then handed a handful of change (3 quarters, 4 dimes, 3 nickels, & 4 pennies), and the stopwatch is started. Be sure the stopwatch is reset to zero. Putting the change in the person's hand reduces the contribution of motor deficits the subject might have in picking up coins off of a flat surface. The subject picks out the change and places it on the table. The timer is stopped when the subject has selected the change. There is a time limit of 2 minutes on this task.

Instrumentation

- Coins (3 quarters, 4 dimes, 3 nickels, 4 pennies)
- Digital stopwatch

NOTES AND CAUTIONS:

- The coins should be placed in the non-dominant hand so they can be picked out with the dominant hand.
- **Motor problems/deficits:** If the subject is unable to hold the coins in one hand and select the appropriate coins with the other, spread the coins on the table and cover them with your hand. Ask the person to count out 67 cents by moving 67 cents to a different location on the table. Start the timer when you uncover the coins.
- Watch the person doing the task. If the person asks what the target amount is, tell them "67 cents" again. Do not give feedback about their accuracy during the task or indicate to the subject how much they have already counted out. (Allowable prompts: target amount only).

Task C Reading Can Ingredients

Description of task

The subject is instructed to find and read aloud the ingredients on three cans of food. This is a real-life visual search task that provides important nutritional information. The subject is handed one can at a time. The stopwatch is started when the subject is handed the can. The stopwatch is stopped after the subject reads the third ingredient listed. There is a time limit of two minutes on this task. This task is a modified version of a three-can task used previously in a gerontological study at the University of Alabama at Birmingham.

Instrumentation

- Digital stopwatch
- An identical set of three different cans, labeled '1', '2', and '3' has been provided to all sites. Cans have been covered with clear tape to avoid wear and tear with continued use.

NOTES AND CAUTIONS:

- Start the stopwatch when you hand the can of food to the subject. Hand the can to the person with the front label facing him/her. (The arrow on top of the can should point toward the subject).
- The only prompt to be given to the subject in response to any question is: "I want you to read the ingredients. It will say the word 'ingredients' on there." This prompt should only be given in response to a question.
- It is common for the subject to read the nutritional information (protein, fat, etc.). If the subject reads the nutrition information and continues, without asking any questions, to read the list of ingredients, simply let the timer go until the third ingredient is read. If the subject asks you something like, "Is that what you want me to read, the response is: "I want you to read the list of ingredients."
- Stop the timer when the subject reads the third ingredient. Record the elapsed time, and check the appropriate accuracy category.

Task D Finding Items on a Shelf

Description of task

This is a timed visual search task using real targets and distracters to simulate locating items on a supermarket shelf. The subject is given two food items to locate in a standardized array of food products. The location of the targets and distracters will be standardized by providing identical kits to each testing site. The shelf containing the food items is placed on a table within arm's reach of a seated subject. The subject is told what two items s/he has to find. After establishing that the subject understands what items s/he is looking for, the array is uncovered and the timer is started. The stopwatch is stopped when the subject has touched the two target items. There is a time limit of 2 minutes on these tasks.

Instrumentation

- Digital stopwatch
- Kit with arrangement of food items

Procedure

Move the closed Timed IADL Kit with the food array to a location on a table within easy reach of the subject. Place the box directly in front of the subject. The shelf should be at eye level. Placing the array on a table with the subject sitting at the table is fine. Ensure that the array is not open such that the subject can view the contents prior to this task.

Task E Reading Directions on Medicine Containers

Description of Task

This task involves instructing the subject to read the directions on two medicine bottles. The ability to find instructions on a medicine container and read them correctly is an important one in the lives of most elderly people. Two real medicine containers are used (supplied in the Timed IADL Kit). The stopwatch is started after giving the subject the medicine container and is stopped when s/he finishes reading the directions. Timing for the two medicine containers is done separately. The time limit for each task is 2 minutes.

Instrumentation

- Digital stopwatch
- Two medicine containers labeled '#1', & '#2'. All sites will use identical medicine containers with identical labels. The labels have been covered with clear plastic to avoid the effects of wear and tear.