ICPSR 4248

ACTIVE (Advanced Cognitive Training for Independent and Vital Elderly), 1999-2001 [United States]

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Form 422 OTDL Questionnaire

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ACTI**V**E

Question by Question Specifications Guide for Administration of the OTDL Form 422

I. Purpose

The Observed Tasks of Daily Living questionnaire (OTDL) represents an attempt to observe the behavior of adults while they are solving selected tasks of daily living. Specifically, items in the OTDL represent selected problems in the domains of Medication Use, Telephone Use, and Financial Management.

Testers are trained to become very accurate observers of OTDL behavior, and to record important details of what they have seen. Exceptional accuracy of recording is needed, not only to preserve subjects' behavior, but to make the scoring of the OTDL easier.

II. Administration

A. The OTDL consists of a total of nine distinct tasks, with a total of thirteen questions which participants have to answer. It is very important that the order of tasks and questions (numbered "Card 1" through "Card 13") be administered in invariant order. The assessment takes approximately 20 minutes to administer.

B. Materials and Equipment

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

- OTDL Data Form, Form # 422
- OTDL Administration Kit
- Q x Q Specifications Guide for the Administration of the OTDL

The OTDL kit consists of a gray plastic case with locking handle. An inventory of contents includes:

- Medication bottles, with pharmacy labels and auxiliary labels
- A telephone, with phone cords removed
- A plastic box with four one-dollar bills and two-dollars in coins
- An orange folder containing laminated "stimulus cards" and 13 Question
- One manila folder containing blank copies of a checkbook ledger, blank checks, and blank envelopes
- One manila folder containing blank copies of a medical history form
- One manila folder containing blank copies of a utility bill

C. Preparation

- 1. All testers must attend the ACTIVE Central Training for Testers.
- 2. Testers must successfully complete all requirements for Certification on the OTDL.
- 3. The OTDL must be completed in a quiet room with a table and two chairs.
- 4. In advance of the subject's appointment time, testers should collate the required OTDL stimuli in the following order.
 - Question Card 1
 - 3 Medication Bottles
 - Ouestion Card 2
 - Question Card 3
 - Laminated Aspirin Leaflet
 - Question Card 4
 - Question Card 5
 - Question Card 6
 - Pencils for subjects' use
 - Unlaminated Medical History Form
 - Question Card 7
 - Question Card 8
 - Laminated Senior Resources Page
 - Telephone
 - Question Card 9
 - Laminated Yellow Pages
 - Question Card 10
 - Laminated Rate Discount Chart
 - Question Card 11
 - Laminated Healthy Way Lunch Receipt
 - Change box
 - Question Card 12
 - Unlaminated Checkbook ledger
 - Question Card 13
 - Unlaminated Check
 - Unlaminated Utility Bill
 - Unsealed blank envelope

This order of materials also represents the order in which stimuli are presented to subjects.

The table that follows shows how question cards, stimuli and materials relate to the OTDL Item Numbers.

Item Number	Task Number	Question Card	Printed Stimuli Needed	Other Stimuli Needed
B1	Med 1	1		3 Medication Bottles
B2	Med 1	1		3 Medication Bottles
В3	Med 1	2		3 Medication Bottles
B4	Med 1	2		3 Medication Bottles
B5	Med 1	2		3 Medication Bottles
B6	Med 2	3	Aspirin Leaflet	
В7	Med 2	4	Aspirin Leaflet	
B8	Med 2	5	Aspirin Leaflet	
B9	Med 3	6	Medical History Form	Pencil
B10	Med 3	7	Medical History Form	Pencil
C 1	Phone 1	8	Senior Resource Pages	Telephone
C2	Phone 1	8	Senior Resource Pages	Telephone, Pencil
C3	Phone 2	9	Yellow Pages	Telephone, Pencil
C4	Phone 2	9	Yellow Pages	Telephone, Pencil
C5	Phone 3	10	Phone Rate Chart	Pencil
C6	Phone 3	10	Phone Rate Chart	Pencil
D1	Finan 1	11	Healthy Way Check	Coin Box
D2	Finan 2	12	Check Ledger	Pencil
D3	Finan 2	12	Check Ledger	Pencil
D4	Finan 3	13	Check, Envelope, Utility Bill	Pencil

- 5. Prior to the testing session, testers should check that the OTDL supplies are replenished. The checkbook ledger, checkbook, envelopes, and medical history forms will run out and need to be copied periodically. ACTIVE Site Coordinators have Master Copies of these 'to-be-copied' items.
- 6. Testers should also be aware of their non-verbal and verbal cues. At the completion of each task or question card, they should neutrally say "Thank You" and move on to the next item. They should never nod affirmatively or negatively, and they should never use reinforcing statements like "Yes", "Okay", "Very Good", "That's not right".
- 7. For all questions in the OTDL data form # 422, record whether the subject behavior (described for each item) was performed or not, i.e. code YES or NO. If no, record the subject's verbatim responses in the space provided. Also, for each item, record whether or not the prompt was given.

III. Section by Section Review

A. Section A:

- **A2.** Visit #: Circle the appropriate visit number. The OTDL is completed at the time of the Baseline Individual Assessment, and repeated again at the time of follow-up Individual Assessments. Each of these visits has a prescribed code identifier. Circle the correct visit on the form in A2.
- **A3.** Form Version: Be sure the printed form version date (on the form) matches the current approved version.

<u>Introductory Script:</u> Read the script on the inside cover of the ACTIVE OTDL Form # 422.

Now, I am going to show you some tasks most older adults have to do in their daily life. These tasks have to do with taking one's medications, using the telephone, and using money to pay for things. For each of these tasks, I will show you certain items--for example, some medicine bottles or a utility bill--and I will ask you to look at these materials for a while so that you can understand what they are about. Then I will ask you a question and I want you to tell me the correct answer. There is always one <u>best</u> answer, and I would like you to answer the questions as best as you can. Are you ready to begin?

B. Section **B**: Taking Medications

Medication Task 1 (B 1 – B5)

To complete Medications Task 1 use the following OTDL stimuli:

- 3 Medication Bottles
- OTDL Question Cards No. 1 and 2

Medication Task 1, Question 1

<u>B1 and B2</u>: First, complete the tester activities for Medications Task 1, Question 1:

- 1. Present the three (3) medication bottles to the subject. Be certain that the pharmacy labels on the medication bottles, <u>not the auxiliary labels</u>, are directed toward the subject;
- 2. Read the Task 1 script verbatim;
- 3. Present Question Card 1 to the subject; and then,
- 4. Observe the subject's behavior closely, looking for the expected 'Subject Behavior' described in the data form for B1 and B2.

Medication Task 1, Question 1, Question Card 1: How many days will a refill of Tagamet last for Bill?

To answer the question on Card 1 we expect the subject to first, find the Tagamet medication bottle, read the directives on the pharmacy label and then verbally reply to the question. The correct verbal response would be, "30 days or 1 month." If the subject completes these steps without prompting, the tester should code YES (code 1) for both items B1 and B2.

If the tester must use the testing prompts to solicit the expected behavior, the tester should code items B1 and/or B2 appropriately and describe the subject's behavior in the space provided in the coding box. Always code B1a and B2a to indicate if the prescribed prompts were used or not, i.e. if prompts are required for either of the 2 expected subject behavior items, the tester should code items B1a and/or B2a as code YES; if prompts are not required, code B1a and/or B2a as code NO. Prompts should not be offered in response to a wrong answer in order to solicit the correct or a more correct response.

Study subjects may respond in different ways to this task or may ask some questions. The subject's question(s) should be written in the space provided in the coding box. Review the following examples of typical questions a subject might ask and the recommended tester responses.

Subject: I don't know a person by the name Bill Reese.

Tester: Yes, Mr. Reese is a pretend person. Let's pretend that Bill Reese is a person your age who is taking these three medications here. I want you to look at these medicine bottles as if you knew Mr. Reese.

Subject: I don't understand what this question is getting at?

Tester: I want you to tell me how long a refill of the medication Tagamet lasts for this patient, given how many pills he has to take daily.

Subject: What is a refill?

Tester: A refill is a new supply of pills that a patient gets from the pharmacy.

Medication Task 1, Question 2

B3 – B5: Next, complete the tester activities for Medication Task 1, Question 2:

- 5. Introduce Question Card 2 verbatim, "Please answer this question now."
- 6. Present Question Card 2 to the subject and then,
- 7. Observe the subject's behavior closely, looking for the expected 'Subject Behavior' described in the data form for B3, B4 and B5.

Medication Task 1, Question 2, Question Card 2: Bill has been feeling sleepy after taking his medication. Can you tell me what might be causing his sleepiness?

To answer the question on Card 2 we expect the subject to first, look closely at the medication bottles, specifically examine the Indocin and Motrin auxiliary labels, and verbally reply to the question. The correct verbal response to the question on Card 2 would be, "Both Indocin and Motrin could cause drowsiness or sleepiness." If the subject completes these steps without prompting, the tester should code YES (code 1) for items B3, B4 and B5.

If the tester must use the testing prompts to solicit the expected subject behaviors, the tester should code items B3, B4, and/or B5 appropriately and describe the subject's behavior in the space provided in the coding box. Always code B3a, B4a and B5a to indicate if the prescribed prompts were used or not, i.e. if prompts are required for any of the 3 expected subject behaviors, the tester should code items B3a, B4a and B5a as YES; if prompts are not required, code these items as NO. Prompts should not be offered in response to a wrong answer in order to solicit the correct, or a more correct response.

Review the following examples of typical questions a subject might ask and the recommended tester responses.

Subject: I don't know what might be causing his sleepiness. I am not a doctor or a pharmacist.

Tester: Please look carefully at <u>all</u> the medicine bottles. Pharmacists usually attach labels to the medicine bottle that inform the patients about some unwanted effects a medication may have.

Subject: It doesn't say anything about sleepiness on this Tagamet bottle.

Tester: Remember that Bill takes all three medications. Please look at all the bottles

Subject: I don't take these (or any) medications.

Tester: That's ok. These are pretend medications for a person named Bill Reese. Please look carefully at <u>all</u> the medication bottles and see if you can answer the question on the card.

Remember, subjects' questions should be written in the space provided in the coding box.

Medication Task 2 (B6 and B7)

To complete Medication Task 2 use the following OTDL stimuli:

- OTDL Question Cards No. 3, 4, and 5
- Over-the-counter Aspirin Leaflet

Medication Task 2, Question 1

B6: Now, complete the tester activities for Medication Task 2, Question 1.

- 1. Present the package insert from an over-the-counter aspirin product;
- 2. Read the Task 2 script verbatim;
- 3. Present Question Card 3 to the subject; and then,
- 4. Observe the subject's behavior closely, looking for the expected 'Subject Behavior' described in the data form for B6.

Medication Task 2, Question 1, Question Card 3: According to this package insert, how many tablets of aspirin can a person take within 24 hours?

To answer the question on Card 3 we expect the subject to verbally reply to the question. The correct verbal response would be, "up to 8 tablets a day". If the subject completes the behavior without prompting, the tester should code YES (code 1) for item B6.

If the tester must prompt the subject to solicit the expected behavior, the tester should code item B6 appropriately and describe the subject's behavior in the space provided in the coding box. Always indicate if the prescribed prompt was used or not. To indicate if the prompt was used or not used to solicit the behavior, the tester should code items B6a appropriately. Prompts should not be offered in response to a wrong answer in order to solicit the correct, or a more correct response.

Medication Task 2, Question 2

<u>B7:</u> Next, complete the tester activities for Medication Task 2, Question 2.

- 5. Present Question Card 4 to the subject; and then,
- 6. Observe the subject's behavior closely, looking for the expected 'Subject Behavior' described in the data form for B7.

Medication Task 2, Question 2, Question Card 4: According to this package insert, in what time interval can the person take the tablets?

To answer the question on Card 4 we expect the subject to verbally reply to the question. The correct verbal response would be, "In 4 hour intervals" OR "Every 4 hours." If the subject completes the behavior without prompting, the tester should code YES (code 1) for item B7.

If the tester must prompt the subject to solicit the expected behavior the tester should code items B7 appropriately and describe the subject's behavior in the space provided in the coding box. Always indicate if the prescribed prompt was used or not. To indicate if the prompt was used or not used to solicit the behavior, code items B7a appropriately.

Prompts should not be offered in response to a wrong answer in order to solicit the correct, or a more correct response.

Responses to Typical Questions

Subject: I don't know. I don't take aspirin, or I only take Tylenol (or Motrin, etc.)

Tester: That's okay. You don't have to take aspirin to answer this question. Just look at the information on the leaflet and see if you can find the answer.

Medication Task 2, Question 3

<u>B8:</u> Now, complete the tester activities for Medication Task 2, Question 3.

- 7. Introduce Question 3 verbatim: "Now, please answer this question."
- 8. Present Question Card 5 to the subject; and then,
- 9. Observe the subject's behavior closely, looking for the expected 'Subject Behavior' described in the data form for B8.

Medication Task 2, Question 3, Question Card 5: An older woman fell about two weeks ago and has been taking these Aspirin tablets because her back has been hurting ever since. According to this leaflet, what should this woman do?

To answer the question on Question Card 5 we expect the subject to verbally reply to the question. The correct verbal response would be, "She should contact her physician immediately." If the subject completes the behavior without prompting, the tester should code YES (code 1) for item B8.

If the tester must prompt the subject to solicit the expected behavior the tester should code items B8 appropriately and describe the subject's behavior in the space provided in the coding box. Always indicate if the prescribed prompt was used or not. To indicate if the prompt was used or not used to solicit the behavior, code items B8a appropriately. Remember, prompts should not be offered in response to a wrong answer in order to solicit the correct, or a more correct response.

Responses to Typical Questions

Subject: I don't know. I am not a doctor.

Tester: You don't need to be a doctor. Over-the-counter medications always have some auxiliary statements included for the consumer.

Medication Task 3 (B9 and B10)

To complete Medication Task 3 use the following OTDL stimuli:

- Medical History Form
- Pencil
- OTDL Question Cards No. 6 and 7

Medication Task 3, Question 1

<u>B9:</u> Next complete the tester activities for Medication Task 3, Question 1.

- 1. Present the Medical History Form to the subject,
- 2. Read the Task 3 script verbatim,
- 3. Present Question Card 6 to the subject and then,
- 4. Observe the subject's behavior closely, looking for the expected 'Subject Behavior' described in the data form for B9.

Medication Task 3, Question 1, Question Card 6: Where on this form would Mr. Dowd write that he is covered by Blue Cross Health Insurance? Write it in now.

To answer the question on Question Card 6 we expect the subject to write Blue Cross Health Insurance in the Insurance section of the Medical History Form. If the subject completes the behavior without prompting, the tester should code YES (code 1) for item B9.

If the tester must prompt the subject to solicit the expected behavior the tester should code items B9 appropriately and describe the subject's behavior in the space provided in the coding box. The tester must always indicate if the prescribed prompt was used or not. To indicate if the prompt was used or not used to solicit the behavior, the tester should code items B9a appropriately. Remember, prompts should not be offered in response to a wrong answer in order to solicit the correct, or a more correct response.

Responses to Typical Questions

Subject: I don't have Blue Cross Health Insurance.

Tester: That's ok. This is a form for Mr. Dowd, who has Blue Cross Health Insurance. Where would Mr. Dowd fill in this information?

Medication Task 3, Question 2

B10: Next complete the tester activities for Medication Task 3, Question 2

- 5. The subject will still be referring to the Medical History Form;
- 6. Introduce Question Card 7 verbatim;
- 7. Present Question Card 7 and then,
- 8. Observe the subject's behavior closely, looking for the expected 'Subject Behavior' described in the data form for B10.

Medication Task 3, Question 2, Question Card 7: Mr. Dowd had unstable blood pressure the last time he had anesthesia. Where on this form would he indicate this? Write it in now.

To answer the question on Question card 7 we expect the subject to circle or check "Yes" next to the question "Have you ever had any complications with anesthesia?" on the Medical History Form. If the subject completes this behavior without prompting, the tester should code YES (code 1) for item B10.

In addition, the subjects may also write *unstable blood pressure* in the 'please describe' section that follows. If the subject completes this behavior without prompting, the tester should code YES (code 1) for item B10a.

If the tester must prompt the subject to solicit the expected behavior the tester should code items B10 and B10a appropriately and describe the subject's behavior in the space provided in the coding box. The tester must always indicate if the prescribed prompt was used or not used. To indicate if the prompt was used or not used to solicit the behavior, the tester should code items B10b appropriately. Remember, prompts should not be offered in response to a wrong answer in order to solicit the correct, or a more correct response.

Responses to Typical Questions

Subject: What is anesthesia?

Tester: Anesthesia is when the doctors give you some medication so that you sleep during a surgery or treatment.

Subject: I never had surgery or anesthesia..

Tester: That's ok. This is information for a man named Mr. Dowd who has had surgery. Where would he fill in information about problems he had with anesthesia when he had surgery?

Subject: It only says anesthesia. It doesn't say anything about blood pressure.

Tester: When Mr. Dowd has anesthesia the last time, his blood pressure was unstable. Maybe it shot up or dropped when he came out of anesthesia. Where would he fill in this information?

C. Section C: Using the Telephone

Phone Task 1 (C1-C2)

To complete Phone Task 1 use the following OTDL stimuli:

- Telephone
- Senior Resource Pages
- Pencil
- OTDL Question Card 8

C1. Next, complete the tester activities for Phone Task 1:

- 1. Present the *touch-tone* telephone
- 2. Present the modified version of the Senior Resources Page from the phone book;
- 3. Read the Task 1 script verbatim;
- 4. Present Question Card 8 to the subject; and then,
- 5. Observe the subject's behavior closely, looking for the expected 'Subject Behavior' described in the data form for C1 and C2.

Phone Task 1, Question Card 8: What number would you dial if you would like to find out about subsidized housing for older adults? You may use a pencil eraser to find the number on this page. Please dial and call out the number.

To answer the question on Question Card 8 we expect the subject to examine the Senior Resource Pages stimuli, locate the Housing Section, point to and call out the correct telephone number, and dial the number on the touch-tone telephone provided. If the subject completes this behavior without prompting, the tester should code YES (code 1) for item C1 and C2.

If the tester must prompt the subject to solicit the expected behavior the tester should code items C1 and C2 appropriately and describe the subject's behavior in the space provided in the coding box. Always indicate if the prescribed prompt was used or not. To indicate if the prompt was used or not used to solicit the behavior, the tester should code items C1a and C2a appropriately. Remember, prompts should not be offered in response to a wrong answer in order to solicit the correct, or a more correct response.

Responses to Typical Questions

Subject: I do not need subsidized housing. I can pay for my home/apartment by myself.

Tester: The question does not mean that you cannot pay the rent for your home/apartment. Let's pretend a friend of yours receives only little in social security and needs a subsidized apartment. You would like to help him/her out and get some information about subsidized housing for him/her. Which number would you dial to get this information?

Phone Task 2 (C3-C4)

To complete Phone Task 2 use the following OTDL stimuli:

- Telephone
- Simulated pages from the *Yellow Pages*
- Pencil
- OTDL Question Card 9

C3 and C4: Next, complete the tester activities for Phone Task 2:

- 1. Present the simulated page from the Yellow Pages
- 2. Read the Task 2 script verbatim;
- 3. Present Question Card 9 to the subject; and then,
- 4. Observe the subject's behavior closely, looking for the expected 'Subject Behavior' described in the data form for C3 and C4.

Phone Task 2, Question Card 9: Which number would you dial if you wanted to have one of your prescriptions filled at a hospital pharmacy? You may use a pencil eraser to find the number on this page. Please dial <u>and</u> call out the number

To answer the question on Question Card 9 we expect the subject to examine the *Yellow Pages* stimuli, locate the hospital pharmacy advertisement, point to and call out the correct telephone number, and dial the number on the touch-tone telephone provided. If the subject completes this behavior without prompting, the tester should code YES (code 1) for item C3 and C4.

If the tester must prompt the subject to solicit the expected behavior the tester should code items C3 and C4 appropriately and describe the subject's behavior in the space provided in the coding box. The tester must always indicate if the prescribed prompt was used or not. To indicate if the prompt was used or not used to solicit the behavior, the tester should code items C3a and C4a appropriately. Remember, prompts should not be offered in response to a wrong answer in order to solicit the correct, or a more correct response.

Subject: I never get my medications from a hospital pharmacy.

Tester: I understand. You may get your medications from a different pharmacy. But let's pretend that this time you needed to get them from a hospital pharmacy. Which number would you dial?

An alternative scenario could be:

Subject: I always ask my doctor to call the pharmacy for the refills/prescriptions.

Tester: Well, let's pretend that your doctor's office was closed and you had to call the pharmacy yourself. Which number would you dial?

Subject: I don't know where any of these pharmacies are located. I don't recognize the streets.

Tester: This is just a sample; it's not located here in this city. Pretend that you wanted to have a prescription filled at a hospital pharmacy. Which number would you dial?

Phone Task 3 (C5-C6)

To complete Phone Task 3 use the following OTDL stimuli:

- Phone Rate Chart
- Pencil
- OTDL Question Card 10

Next, complete the tester activities for Phone Task 3:

- 1. Present the Rate Discount Chart
- 2. Read the Task 3 script verbatim;
- 3. Present Question Card 10 to the subject; and then,
- 4. Observe the subject's behavior closely, looking for the expected 'Subject Behavior' described in the data form for C3 and C4.

Phone Task 3, Question Card 10: If you make a long-distance call on a Sunday night from 10:30 PM until 11:00 PM, which long-distance charge applies? You may use a pencil eraser to find the location on this page. Please <u>tell me</u> which rate you think applies.

To answer the question on Question card 10 we expect the subject to examine the Rate Discount Chart, locate the correct time period on the chart (Discount from Full Rate), point to and call out the correct long distance rate and verbally reply to the question. If the subject completes this behavior without prompting, the tester should code YES (code 1) for item C5 and C6.

If the tester must prompt the subject to solicit the expected behavior the tester should code items C5 and C6 appropriately and describe the subject's behavior in the space provided in the coding box. The tester must always indicate if the prescribed prompt was used or not. To indicate if the prompt was used or not used to solicit the behavior, the tester should code C5a and C6a as appropriate. Remember, prompts should not be offered in response to a wrong answer in order to solicit the correct, or a more correct response.

Subject: I never pay attention to the different rates for long-distance calls. I just make my long-distance calls whenever I feel I want to.

Tester: I see, you don't pay attention how much your long-distance calls cost. Let's assume that you would have to make ends meet with very little money. Therefore, you look for any opportunity to save money, even with your long-distance calls. Which rate applies on a Sunday night from 10:30 until 11:00 p.m.?

An alternative scenario could be:

Subject: I never make long-distance calls, because I can't afford it. I always ask to be called.

Tester: Well, let's pretend that you wanted to surprise someone with a call on a Sunday night. This would be an exception. Which rate applies on a Sunday night from 10:30 until 11:00 p.m.?

D. Section D: <u>Managing Finances</u>

Managing Finances Task 1 (D1)

To complete Managing Finances Task 1 use the following OTDL stimuli:

- Healthy Way Deli Check Receipt
- Coin Box
- OTDL Question Card 11

<u>D1.</u> Next, complete the tester activities for Managing Finances Task 1.

- 1. Present the *Healthy Way Deli* Lunch Check
- 2. Present the Coin Box with all the required coins
- 3. Read the Task 1 script verbatim;
- 4. Present Question Card 11 to the subject; and then,
- 5. Observe the subject's behavior closely, looking for the expected 'Subject Behavior' described in the data form for D1.

Managing Finances Task 1, Question Card 11: Please count the exact change that this customer would get back on this lunch check if she paid with a \$10.00 bill.

To answer the question on Question card 11 we expect the subject to examine the *Healthy Way Deli* Receipt stimuli, determine the difference between the amount due and the \$10.00 bill and make change from the money available in the coin box. The subject may calculate the amount of change due using a scratch pad.

Item D1a – D1e describes the four correct 'change-making' options. If the subject makes correct change using one of these 4 options without prompting, the tester should code YES (code 1) for the appropriate option (D1a- D1e). The other options should be coded NO.

If the tester must prompt the subject to solicit the expected behavior the tester should code items D1a – D1e appropriately and describe the subject's behavior in the space provided in the coding box. Always indicate if the prescribed prompt was used or not. To indicate if the prompt was used or not used to solicit the behavior, the tester should code D1f as appropriate. Remember, prompts should not be offered in response to a wrong answer in order to solicit the correct, or a more correct response.

If the subject ask for a scratch pad to calculate the amount of change due the tester should provide scratch paper and code this in D1g.

Subject: I never go out for lunch, I always have my lunch at home.

Tester: Well, let's pretend you made an exception and had lunch with a friend at a place that you both like. Can you count the change for me?

Subject: Can I use scratch paper?

Tester: Yes, that's ok. You can write on this pad.

Managing Finances Task 2 (D2-D3)

To complete Managing Finances Task 2 use the following OTDL stimuli:

- Check Ledger
- Pencil
- OTDL Question Card 12

<u>D1.</u> Next, complete the tester activities for Managing Finances Task 2.

- 1. Present the Check Ledger and Pencil
- 2. Read the Task 2 script verbatim;
- 3. Present Question Card 12 to the subject; and then,
- 4. Observe the subject's behavior closely, looking for the expected 'Subject Behavior' described in the data form for D2 and D3.

Managing Finances Task 2, Question Card 12: The person who holds this checking account received a check for \$50.00 for deposit and also paid a utility bill for the amount of \$29.21. Please balance the checkbook for this person.

To answer the question on Question card 12 we expect the subject to examine the Check Ledger stimuli, write \$50.00 in the 'Credit/Deposit column of the ledger, write \$29.21 in the Debit/Withdrawal column of the ledger (in either order) and come up with a final balance of \$752.29. The subject might arrive at the final balance in one of two ways:

- The subject might first add the \$50.00 deposit, then subtract the \$29.21 withdrawal, or
- The subject might first subtract the withdrawal then add the deposit.

If the subject balances the ledger correctly, the tester should code YES or NO for items D2a, D2b, D3a and D3b.

If the tester must prompt the subject to solicit the expected behavior the tester should code items D2c and D3c appropriately and describe the subject's behavior in the space provided in the coding box. Always indicate if the prescribed prompt was used or not. To indicate if the prompt was used or not used to solicit the behavior, the tester should code D2c and D3c as appropriate. Remember, prompts should not be offered in response to a wrong answer in order to solicit the correct, or a more correct response.

If the subject uses a scratch pad or the margins of the ledger to calculate the balance, the tester should code this in D3d.

Subject: I do not have a checking account. I pay everything in cash.

Tester: Let's pretend a neighbor or a friend who has a checking account asked you to help him/her with balancing the checkbook. Please show me on this sheet how you would do it.

Subject: Can I use scratch paper?

Tester: Yes, that's ok. You can write on this pad.

Managing Finances Task 3 (D4)

To complete Managing Finances Task 3 use the following OTDL stimuli:

- Utility Bill stimuli
- Check stimuli
- Envelope
- Pencil
- OTDL Question Card 13

<u>D4.</u> Next, complete the tester activities for Managing Finances Task 3.

- 1. Present the Utility Bill, Check stimulus and mailing envelope,
- 2. Read the Task 3 script verbatim;
- 3. Present Question Card 13 to the subject; and then,
- 4. Observe the subject's behavior closely, looking for the expected 'Subject Behavior' described in the data form for D4.

Managing Finances Task 3, Question Card 13: This is a utility bill that has arrived for you in the mail. Please fill out this check and show me what you would do to pay this bill properly. Please do <u>everything</u> that you would need to do to get this payment ready for mailing. You do not have to pay late fees.

To answer the question on Question card 13 we expect the subject to examine the Utility Bill stimuli and determine the amount due; complete all check writing activities accurately including writing the following things in the correct spaces on the check:

- date and year,
- 'Grand City Edison',
- \$29.21,
- 'Twenty-nine and 21/100,
- signs the check;

correctly prepare the bill and envelope for mailing including:

- addressing the envelope,
- including a return address on the envelope,
- detach the return portion of the bill,
- stuff envelope with the return portion of the bill and the completed check
- seals the envelope.

If the subject completes all the prescribed activities correctly, the tester should code YES for D4a-D4h.

If the tester must prompt the subject to solicit the expected behavior the tester should code items D4a – D4f appropriately and describe the subject's behavior in the space provided in the coding box. . Always indicate if the prescribed prompt was used or not. To indicate if the prompt was used or not used to solicit the behavior, the tester should code D4i as appropriate. Remember, prompts should not be offered in response to a wrong answer in order to solicit the correct, or a more correct response

Subject: My son/daughter helps me with paying my utility bills. I never do it.

Tester: Let's pretend your son/daughter are on vacation and you really need to pay this bill on time. Please show me how you would do it.

Subject: The bill says May 19. Do I owe late fees?

Tester: No, this is a pretend bill. Please assume you are paying the bill on time.

Subject: Do I need to fill in the amount on the return bill portion?

Tester: You may if you like. It's up to you.

D5. OTDL END TIME: Record the time you complete the OTDL Assessment when the subject completes the last task. Use a standard 12 hour clock; do not leave blank spaces, use leading zeros as required. Circle AM or PM as appropriate.