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ICPSR 4248

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

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Form 422 OTDL Codebook

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ACTIVE

OTDL
Form #422

A1. Subject ID# | Label:

A2. Visit #   I1,   I3,   I4,   I5   (circle one)

A3. Form Version: 03/01/1998

A4. Tester ID/Initials: ___ ___ ___

A5. Date Completed:__ __/ __ __/ __ __ __ __

VISIT	Frequency	Percent	Cum Freq	Cum Percent
I1	2799	40.87	2799	40.87
I3	2081	30.38	4880	71.25
I4	1969	28.75	6849	100.00

A.6. RECORD OTDL START TIME NOW: _____ _____: _____ _____   AM\PM

READ INTRODUCTORY SCRIPT:

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?

SECTION B.	TAKING MEDICATIONS

TASK 1: PRESENT 2.5" X 2.0" MEDICINE BOTTLES FOR THREE PRESCRIPTIONS WITH PHARMACY LABELS FACING THE SUBJECT AND SAY:

Here are the three medicine bottles for an elderly man. His name is Bill Reese. Please look at the labels on these medicine bottles for a moment and then answer the questions that you see here on this index card.

B1.   HOW MANY DAYS WILL A REFILL OF TAGAMET LAST FOR BILL? (Card 1)

SUBJECT BEHAVIOR	CODING
SUBJECT FINDS/POINTS TO/ EXAMINES TAGAMET BOTTLE.	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., POINTED TO ANOTHER BOTTLE.):

↓

TAG	Frequency	Percent	Cum Freq	Cum Percent
-9	1	0.01	1	0.01
0	293	4.28	294	4.29
1	6555	95.71	6849	100.00

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT: **Please look at the medicine bottles. Which of the medicines is Tagamet?**	
B1a. PROMPT GIVEN? YES……….1 NO……….2	

TAGP	Frequency	Percent	Cum Freq	Cum Percent
1	1230	17.96	1230	17.96
2	5619	82.04	6849	100.00

B2.

SUBJECT BEHAVIOR	CODING
SUBJECT SAYS "30 Days" OR "1 Month"	YES…1 NO…2
	IF NO, EXPLAIN BELOW (E.G., SAID "60 DAYS"):

↓

DAYS	Frequency	Percent	Cum Freq	Cum Percent
0	2241	32.72	2241	32.72
1	4608	67.28	6849	100.00

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT: **Please read the card and answer the question. How many days will a refill of Tagamet last for Bill?**
B2a. PROMPT GIVEN?   YES……….1   NO……….2

DAYSP	Frequency	Percent	Cum Freq	Cum Percent
-9	2	0.03	2	0.03
1	1266	18.48	1268	18.51
2	5581	81.49	6849	100.00

TESTER SAYS: **Please answer this question now.**

B3.   BILL HAS BEEN FEELING SLEEPY AFTER HIS MEDICATIONS. CAN YOU TELL ME
       WHAT MIGHT BE CAUSING HIS SLEEPINESS? (Card 2)

SUBJECT BEHAVIOR	CODING
SUBJECT FINDS/POINTS TO/ EXAMINES INDOCIN OR MOTRIN BOTTLE.	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., DIDN'T SEE BOTTLE):

INDO	Frequency	Percent	Cum Freq	Cum Percent
0	569	8.31	569	8.31
1	6280	91.69	6849	100.00

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT: **Please look at the medicine bottles.**
B3a. PROMPT GIVEN?   YES……….1   NO……….2

INDOP	Frequency	Percent	Cum Freq	Cum Percent
-9	2	0.03	2	0.03
1	1249	18.24	1251	18.27
2	5598	81.73	6849	100.00

B4.

SUBJECT BEHAVIOR	CODING
SUBJECT FINDS/POINTS TO/ EXAMINES MOTRIN OR INDOCIN BOTTLE.	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., DIDN'T SEE BOTTLE):

MOT	Frequency	Percent	Cum Freq	Cum Percent
0	1266	18.48	1266	18.48
1	5583	81.52	6849	100.00

↓

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT: **Please look at all the medicine bottles.**

B4a. PROMPT GIVEN?   YES……….1   NO……….2

MOTP	Frequency	Percent	Cum Freq	Cum Percent
-9	3	0.04	3	0.04
1	1115	16.28	1118	16.32
2	5731	83.68	6849	100.00

B5.

SUBJECT BEHAVIOR	CODING
SUBJECT SAYS "Indocin <u>and</u> Motrin may cause drowsiness"	YES…1　　　　　NO…2 IF NO, EXPLAIN BELOW (E.G., SAID "INDOCIN ONLY"):

IM	Frequency	Percent	Cum Freq	Cum Percent
0	1224	17.87	1224	17.87
1	2577	37.63	3801	55.50
2	3048	44.50	6849	100.00

↓

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT: **Is there any information about drowsiness or dizziness on the medicine bottles?**
B5a. PROMPT GIVEN?　　　　　YES……….1　　　　　　　　NO……….2

IMP	Frequency	Percent	Cum Freq	Cum Percent
-9	3	0.04	3	0.04
1	2220	32.41	2223	32.46
2	4626	67.54	6849	100.00

TASK 2: PRESENT THE PACKAGE INSERT FROM AN OVER-THE-COUNTER ASPIRIN PRODUCT AND SAY:

This is the package insert from an aspirin product that you can buy over the counter. A person may use this product when he or she has some minor pain. Please look at this package insert for a moment and then read the following questions.

HAND INDEX CARD TO SUBJECT.

B6. ACCORDING TO THIS PACKAGE INSERT, HOW MANY TABLETS OF ASPIRIN CAN A PERSON TAKE WITHIN 24 HOURS? (Card 3)

SUBJECT BEHAVIOR	CODING
SUBJECT SAYS: "Up to 8 tablets".	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., "SAID 4 TABLETS"):

TABS	Frequency	Percent	Cum Freq	Cum Percent
0	417	6.09	417	6.09
1	6432	93.91	6849	100.00

↓

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT: **Is there any information about how many tablets a person can take in 24 hours?**
B6a. PROMPT GIVEN? YES……….1 NO……….2

TABSP	Frequency	Percent	Cum Freq	Cum Percent
-9	1	0.01	1	0.01
1	485	7.08	486	7.10
2	6363	92.90	6849	100.00

B7.   (HAND SUBJECT NEXT CARD.) ACCORDING TO THIS PACKAGE INSERT, IN WHAT
        TIME INTERVALS CAN THE PERSON TAKE THE TABLETS? (Card 4)

SUBJECT BEHAVIOR	CODING
SUBJECT SAYS "In 4 hour intervals" OR "Every 4 hours".	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., SAID "EVERY 8 HOURS"):

EVER	Frequency	Percent	Cum Freq	Cum Percent
0	213	3.11	213	3.11
1	6636	96.89	6849	100.00

↓

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT: **Do the directions say anything about a time interval in which one can take the pills over again?**
B7a. PROMPT GIVEN?   YES……….1   NO……….2

EVERP	Frequency	Percent	Cum Freq	Cum Percent
1	227	3.31	227	3.31
2	6622	96.69	6849	100.00

TESTER SAYS: **Now please answer this question.**

HAND INDEX CARD TO SUBJECT.

B8.   AN OLDER WOMAN FELL ABOUT TWO WEEKS AGO AND HAS BEEN TAKING THESE
ASPIRIN TABLETS BECAUSE HER BACK HAS BEEN HURTING HER EVER SINCE.
ACCORDING TO THIS LEAFLET, WHAT SHOULD THIS WOMAN DO? (Card 5)

SUBJECT BEHAVIOR	CODING
SUBJECT SAYS: "She should contact her physician immediately".	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., SAID 'DO NOTHING'):

CONS	Frequency	Percent	Cum Freq	Cum Percent
-9	1	0.01	1	0.01
0	352	5.14	353	5.15
1	6496	94.85	6849	100.00

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR
SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT:
**Do the instructions say anything about what a person should do if a pain lasts for a longer
period of time?**

B8a. PROMPT GIVEN?   YES……….1   NO……….2

CONSP	Frequency	Percent	Cum Freq	Cum Percent
-9	2	0.03	2	0.03
1	294	4.29	296	4.32
2	6553	95.68	6849	100.00

TASK 3: PRESENT THE PATIENT RECORD TO THE SUBJECT AND SAY:

A man named Mr. Dowd is going to a new doctor. This is the form that patients usually have to fill out when they see a new doctor. Please take a moment to look at this patient record, and then complete the following activity.

HAND INDEX CARD TO SUBJECT.

B9.   WHERE ON THIS FORM WOULD MR. DOWD WRITE THAT HE IS COVERED BY BLUE CROSS HEALTH INSURANCE? WRITE IT IN NOW. (Card 6)

SUBJECT BEHAVIOR	CODING
SUBJECT WRITES: "Blue Cross Health Insurance" IN THE "INSURANCE" SECTION OF THE FORM.	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., WROTE NOTHING):

BLUE	Frequency	Percent	Cum Freq	Cum Percent
-9	1	0.01	1	0.01
0	974	14.22	975	14.24
1	5874	85.76	6849	100.00

↓

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT:
Do you see any space for insurance information?

B9a. PROMPT GIVEN?   YES……….1   NO……….2

BLUEP	Frequency	Percent	Cum Freq	Cum Percent
-9	2	0.03	2	0.03
1	2235	32.63	2237	32.66
2	4612	67.34	6849	100.00

TESTER SAYS: **Please answer this question now.**

B10a. MR. DOWD HAD UNSTABLE BLOOD PRESSURE THE LAST TIME HE HAD ANESTHESIA.
WHERE ON THE FORM WOULD HE INDICATE THIS? WRITE IT IN NOW. (Card 7)

SUBJECT BEHAVIOR	CODING
SUBJECT MARKS/CHECKS "Yes" NEXT TO THE QUESTION "HAVE YOU EVER HAD ANY COMPLICATIONS WITH ANESTHESIA?"	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., CHECKED ANOTHER AREA):

COMP	Frequency	Percent	Cum Freq	Cum Percent
-9	2	0.03	2	0.03
0	2822	41.20	2824	41.23
1	4025	58.77	6849	100.00

B10b.

SUBJECT BEHAVIOR	CODING
SUBJECT WRITES "Unstable Blood Pressure" IN THE "PLEASE DESCRIBE" SECTION.	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., WROTE NOTHING):

UNBLP	Frequency	Percent	Cum Freq	Cum Percent
-9	1	0.01	1	0.01
0	2741	40.02	2742	40.04
1	4107	59.96	6849	100.00

|
↓

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR
SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT:
Where on this form does it ask about anesthesia?

B10c. PROMPT GIVEN?   YES……….1   NO……….2

COMPP	Frequency	Percent	Cum Freq	Cum Percent
-9	2	0.03	2	0.03
1	1086	15.86	1088	15.89
2	5761	84.11	6849	100.00

TASK 1: PRESENT A *TOUCH-TONE TELEPHONE* AND A MODIFIED VERSION OF THE *SENIOR RESOURCES PAGE* FROM THE PHONE BOOK. THE TESTER SAYS:

Here is a touch-tone telephone and a page from a phone book that lists several services for senior citizens. Please look at this page for a moment and then complete the activity shown here.

C1. 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 POINT TO THE NUMBER, CALL OUT THE NUMBER, AND THEN DIAL IT. (Card 8)

SUBJECT BEHAVIOR	CODING
SUBJECT FINDS/POINTS TO/ EXAMINES HOUSING SECTION.	YES…1　　　　　NO…2 IF NO, EXPLAIN BELOW (E.G., POINTED TO ANOTHER AREA):

HOUS	Frequency	Percent	Cum Freq	Cum Percent
-9	4	0.06	4	0.06
0	271	3.96	275	4.02
1	6574	95.98	6849	100.00

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IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT:
Can you see any information on this page that refers to housing?

C1a. PROMPT GIVEN?　　　　　YES……….1　　　　　NO……….2

HOUSP	Frequency	Percent	Cum Freq	Cum Percent
-9	7	0.10	7	0.10
1	757	11.05	764	11.15
2	6085	88.85	6849	100.00

C2.

SUBJECT BEHAVIOR	CODING
SUBJECT DIALS AND CALLS OUT "471-2096"	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., DIALED 470-1196):

NUMA	Frequency	Percent	Cum Freq	Cum Percent
-9	1	0.01	1	0.01
0	2243	32.75	2244	32.76
1	4605	67.24	6849	100.00

↓

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT: **Please let me see you dial the number.**
C2a. PROMPT GIVEN?   YES……….1   NO……….2

NUMAP	Frequency	Percent	Cum Freq	Cum Percent
-9	1	0.01	1	0.01
1	1866	27.24	1867	27.26
2	4982	72.74	6849	100.00

TASK 2: PRESENT THE SIMULATED PAGE FROM THE *YELLOW PAGES* AND SAY

This is a page from the Yellow Pages of a phone book. Please look at this page for a moment and then complete the activity that is shown on this index card. HAND CARD TO SUBJECT.

C3. 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 POINT TO THE NUMBER, CALL OUT THE NUMBER, AND THEN DIAL IT. (Card 9)

SUBJECT BEHAVIOR	CODING
SUBJECT FINDS/POINTS TO/ EXAMINES HOSPITAL PHARMACY ADVERTISEMENT.	YES…1　　　　　NO…2　　　IF NO, EXPLAIN BELOW (E.G., POINTED TO ANOTHER AREA):

PHAR	Frequency	Percent	Cum Freq	Cum Percent
-9	5	0.07	5	0.07
0	321	4.69	326	4.76
1	6523	95.24	6849	100.00

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IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT: **Can you show me the advertisement for the hospital pharmacy?**
C3a. PROMPT GIVEN?　　　　　YES……….1　　　　　NO……….2

PHARP	Frequency	Percent	Cum Freq	Cum Percent
-9	4	0.06	4	0.06
1	592	8.64	596	8.70
2	6253	91.30	6849	100.00

C4.

SUBJECT BEHAVIOR	CODING
SUBJECT DIALS AND CALLS OUT "776-5486"	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., DIALED 776-5012):

NUMB	Frequency	Percent	Cum Freq	Cum Percent
-9	2	0.03	2	0.03
0	2471	36.08	2473	36.11
1	4376	63.89	6849	100.00

↓

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT: **Please let me see you dial the number.**
C4a. PROMPT GIVEN?   YES……….1   NO……….2

NUMBP	Frequency	Percent	Cum Freq	Cum Percent
-9	5	0.07	5	0.07
1	1101	16.08	1106	16.15
2	5743	83.85	6849	100.00

TASK 3: PRESENT THE *RATE DISCOUNT CHART* FOR LONG DISTANCE CALLS AND SAY:

This is the rate discount chart from a phone book. Please look at this chart for a moment and then complete the activity shown on the index card. HAND CARD TO SUBJECT.

C5.   IF YOU MAKE A LONG-DISTANCE CALL ON A SUNDAY NIGHT FROM 10:30PM UNTIL 11:00PM, WHICH LONG DISTANCE CHARGE APPLIES? FIRST, FIND THE LOCATION ON THIS PAGE. YOU MAY USE A PENCIL ERASER TO FIND IT. THEN <u>TELL ME</u> WHICH RATE YOU THINK APPLIES. (Card 10)

SUBJECT BEHAVIOR	CODING
SUBJECT FINDS/POINTS TO/ EXAMINES CORRECT ("Discount from Full Rate") TIME PERIOD ON THE RATE CHART.	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., POINTS ANOTHER PERIOD):

PART	Frequency	Percent	Cum Freq	Cum Percent
-9	4	0.06	4	0.06
-7	1	0.01	5	0.07
0	3156	46.08	3161	46.15
1	3688	53.85	6849	100.00

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IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT: **Where on the chart do you see the days of the week and the time of the day?**
C5a. PROMPT GIVEN?   YES……….1   NO……….2

PARTP	Frequency	Percent	Cum Freq	Cum Percent
-9	8	0.12	8	0.12
-7	1	0.01	9	0.13
1	1482	21.64	1491	21.77
2	5358	78.23	6849	100.00

C6.

SUBJECT BEHAVIOR	CODING
SUBJECT SAYS: "The Discount from Full Rate Charge".	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., SAID "LARGEST DISCOUNT"):

DISC	Frequency	Percent	Cum Freq	Cum Percent
-9	3	0.04	3	0.04
-7	1	0.01	4	0.06
0	4193	61.22	4197	61.28
1	2652	38.72	6849	100.00

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IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT:
Please show me the rate that applies.

C6a. PROMPT GIVEN?   YES……….1   NO……….2

DISCP	Frequency	Percent	Cum Freq	Cum Percent
-9	6	0.09	6	0.09
-7	1	0.01	7	0.10
1	1527	22.30	1534	22.40
2	5315	77.60	6849	100.00

SECTION D.	MANAGING FINANCES

TASK 1: THE TESTER PRESENTS TO THE SUBJECT THE *LUNCH CHECK* FROM THE HEALTHY WAY DELI AND PRESENTS THE AMOUNT OF $6.00 IN FOUR $1.00 BILLS AND THE REMAINING $2.00 IN COINS CONSISTING OF 6 QUARTERS, 3 DIMES, AND 4 NICKLES. THE TESTER SAYS:

This is the lunch check that a person had to pay. Here also is some change. Please look at this check and then complete the activity shown on this index card. HAND CARD TO SUBJECT.

D1. PLEASE COUNT THE EXACT CHANGE THAT THIS CUSTOMER WOULD GET BACK ON THIS LUNCH CHECK IF SHE PAID WITH A $10.00 BILL. (Card 11)

SUBJECT BEHAVIOR	CODING
D1a. $3.15 **COUNTED** AS: 3-$1.00 BILLS + 1 DIME + 1 NICKEL	YES…1 NO…2

MONA	Frequency	Percent	Cum Freq	Cum Percent
-9	3	0.04	3	0.04
0	740	10.80	743	10.85
4	6106	89.15	6849	100.00

SUBJECT BEHAVIOR	CODING
D1b. $3.15 **COUNTED** AS: 3-$1.00 BILLS + 3 NICKELS	YES…1 NO…2

MONB	Frequency	Percent	Cum Freq	Cum Percent
-9	4	0.06	4	0.06
0	6522	95.23	6526	95.28
4	323	4.72	6849	100.00

	D1c. $3.15 **COUNTED** AS: 2-$1.00 BILLS + 4 QUARTERS + 3 NICKELS	YES…1 NO…2

MONC	Frequency	Percent	Cum Freq	Cum Percent
-9	4	0.06	4	0.06
0	6845	99.94	6849	100.00

	D1d. $3.15 **COUNTED** AS: 2-$1.00 BILLS + 4 QUARTERS + 1 DIME + 1 NICKEL	YES…1 NO…2

MOND	Frequency	Percent	Cum Freq	Cum Percent
-9	4	0.06	4	0.06
0	6835	99.80	6839	99.85
4	10	0.15	6849	100.00

	D1e. **OTHER** (SPECIFY):	YES…1 NO…2

MONE	Frequency	Percent	Cum Freq	Cum Percent
-9	4	0.06	4	0.06
0	6810	99.43	6814	99.49
4	35	0.51	6849	100.00

↓

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR
SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT:
What was the amount or size bill that the person paid this lunch check with?

D1f. PROMPT GIVEN?   YES……….1   NO……….2

MONAP	Frequency	Percent	Cum Freq	Cum Percent
-9	5	0.07	5	0.07
1	326	4.76	331	4.83
2	6518	95.17	6849	100.00

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D1g. DID THE SUBJECT USE SCRATCH PAPER?

        YES……….1   NO……….2

MONS	Frequency	Percent	Cum Freq	Cum Percent
-9	6	0.09	6	0.09
1	182	2.66	188	2.74
2	6661	97.26	6849	100.00

TASK 2: PRESENT THE *BALANCE SHEET* FROM A CHECKBOOK TO THE SUBJECT AND SAY:

This is an older person's balance sheet from the checkbook. Please balance this person's checkbook using the information on the index card. HAND CARD TO SUBJECT.

D2. 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 A CHECKBOOK FOR THIS PERSON. (Card 12)

SUBJECT BEHAVIOR	CODING
D2a. SUBJECT WRITES $50.00 IN CREDIT/DEPOSIT COLUMN <u>AND</u> COMES UP WITH A FIRST BALANCE OF $781.50* *NOTE: IF SUBJECT STARTED WITH WITHDRAWAL FIRST, SKIP THIS ITEM AND **GO TO <u>D2B</u>.**	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., "RECORDED $50 CORRECTLY, BUT ARITHMETIC WRONG -- BALANCE WAS 701.72"; OR "DIDN'T PUT $50 IN CORRECT COLUMN, BUT BALANCE WAS CORRECT"):

DEP	Frequency	Percent	Cum Freq	Cum Percent
-9	3	0.04	3	0.04
-7	7	0.10	10	0.15
0	507	7.40	517	7.55
1	2422	35.36	2939	42.91
2	3910	57.09	6849	100.00

SUBJECT BEHAVIOR	CODING
D2b. SUBJECT WRITES $29.21 IN DEBIT/WITHDRAWAL COLUMN <u>AND</u> COMES UP WITH A FIRST BALANCE OF $702.29	YES…1　　　　　　NO…2 IF NO, EXPLAIN BELOW (E.G., "RECORDED $29.21 CORRECTLY, BUT ARITHMETIC WRONG -- BALANCE WAS 701.72"; OR "DIDN'T PUT $29.21 IN CORRECT COLUMN, BUT BALANCE WAS CORRECT"):

IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT:
Which amount is deposited?

D2c.　PROMPT GIVEN?　　　　　　YES……….1　　　　　　NO……….2

DEPP	Frequency	Percent	Cum Freq	Cum Percent
-9	13	0.19	13	0.19
-7	2	0.03	15	0.22
1	816	11.91	831	12.13
2	6018	87.87	6849	100.00

D3.

SUBJECT BEHAVIOR	CODING
D3a. SUBJECT WRITES $29.21 IN DEBIT/WITHDRAWAL COLUMN AND COMES UP WITH A FINAL BALANCE OF $752.29* *NOTE: IF SUBJECT STARTED WITH WITHDRAWAL IN D2 ABOVE, SKIP THIS ITEM AND **GO TO D3B.**	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., "RECORDED $29.21 CORRECTLY, BUT ARITHMETIC WRONG -- BALANCE WAS 701.72"; OR "DIDN'T PUT $29.21 IN CORRECT COLUMN, BUT BALANCE WAS CORRECT"):

WITH	Frequency	Percent	Cum Freq	Cum Percent
-9	3	0.04	3	0.04
-7	8	0.12	11	0.16
0	805	11.75	816	11.91
1	2839	41.45	3655	53.37
2	3194	46.63	6849	100.00

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SUBJECT BEHAVIOR	CODING
D3b. SUBJECT WRITES $50.00 IN CREDIT/DEPOSIT COLUMN AND COMES UP WITH A FINAL BALANCE OF $752.29	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., "RECORDED $50.00 CORRECTLY, BUT ARITHMETIC WRONG-- BALANCE WAS 701.72"; OR "DIDN'T PUT $50.00 IN CORRECT COLUMN, BUT BALANCE WAS CORRECT"):

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IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECT SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT: **Which amount is paid out?**

D3c. PROMPT GIVEN?   YES……….1   NO……….2

WITHP	Frequency	Percent	Cum Freq	Cum Percent
-9	3	0.04	3	0.04
-7	2	0.03	5	0.07
1	430	6.28	435	6.35
2	6414	93.65	6849	100.00

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D3d. DID THE SUBJECT USE SCRATCH PAPER OR WRITE IN MARGINS FOR D2 OR D3?

YES……….1   NO……….2

WITHS	Frequency	Percent	Cum Freq	Cum Percent
-9	5	0.07	5	0.07
-7	2	0.03	7	0.10
1	2825	41.25	2832	41.35
2	4017	58.65	6849	100.00

TASK 3: PRESENT THE SUBJECT WITH A UTILITY BILL, A CHECK, AND A MAILING ENVELOPE, PRESENT PARTICIPANT WITH THE INDEX CARD, AND SAY:

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 everything you would need to do to get this payment ready for mailing. You do not have to pay late fees. (Card 13)

D4.

SUBJECT BEHAVIOR	CODING
D4a. SUBJECT WRITES IN DATE AND YEAR ON CHECK.	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., "LEFT BLANK"):

DTYR	Frequency	Percent	Cum Freq	Cum Percent
-9	6	0.09	6	0.09
-7	2	0.03	8	0.12
0	208	3.04	216	3.15
1	467	6.82	683	9.97
2	6166	90.03	6849	100.00

SUBJECT BEHAVIOR	CODING
D4b. SUBJECT WRITES IN PAY TO THE ORDER FIELD "Grand City Edison"	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., "NAMED DIFFERENT CO."):

PAY	Frequency	Percent	Cum Freq	Cum Percent
-9	6	0.09	6	0.09
-7	2	0.03	8	0.12
0	531	7.75	539	7.87
1	6310	92.13	6849	100.00

| D4c. SUBJECT WRITES AMOUNT IN NUMBERS "$29.21" | YES…1   NO…2

IF NO, EXPLAIN BELOW (E.G., "WROTE $27.21"): |
|---|---|

TWENTY	Frequency	Percent	Cum Freq	Cum Percent
-9	6	0.09	6	0.09
-7	2	0.03	8	0.12
0	252	3.68	260	3.80
1	6589	96.20	6849	100.00

| D4d. SUBJECT WRITES AMOUNT IN WORDS "Twenty-nine and 21/100" | YES…1   NO…2

IF NO, EXPLAIN BELOW (E.G., "LEFT BLANK"): |
|---|---|

TWENTYB	Frequency	Percent	Cum Freq	Cum Percent
-9	7	0.10	7	0.10
-7	2	0.03	9	0.13
0	1093	15.96	1102	16.09
1	5747	83.91	6849	100.00

SUBJECT BEHAVIOR	CODING
D4e. SUBJECT SIGNS OWN NAME AT SIGNATURE LINE	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., "LEFT BLANK"):

SIGN	Frequency	Percent	Cum Freq	Cum Percent
-9	7	0.10	7	0.10
-7	2	0.03	9	0.13
0	622	9.08	631	9.21
1	6218	90.79	6849	100.00

SUBJECT BEHAVIOR	CODING
D4f. SUBJECT WRITES UTILITY ADDRESS ON ENVELOPE: "Grand City Edison, P.O. Box 7150, Grand City, US 12345"	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., "ONLY WROTE CO. NAME"):

ADDR	Frequency	Percent	Cum Freq	Cum Percent
-9	9	0.13	9	0.13
-7	2	0.03	11	0.16
0	1399	20.43	1410	20.59
1	50	0.73	1460	21.32
2	58	0.85	1518	22.16
3	5331	77.84	6849	100.00

	D4g. SUBJECT WRITES IN RETURN ADDRESS "Name Street/Apt. City, State, Zip Code"	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., "INDICATED THEY WOULD USE A LABEL HERE"):

RADDR	Frequency	Percent	Cum Freq	Cum Percent
-9	8	0.12	8	0.12
-7	2	0.03	10	0.15
0	2480	36.21	2490	36.36
1	112	1.64	2602	37.99
2	463	6.76	3065	44.75
3	3784	55.25	6849	100.00

	D4h. SUBJECT TEARS RETURN PORTION OF BILL AND PLACES CHECK AND RETURN PORTION OF BILL INTO ENVELOPE AND SEALS IT.	YES…1 NO…2 IF NO, EXPLAIN BELOW (E.G., "FORGOT RETURN PORTION OF BILL" OR "DIDN'T SEAL ENVELOPE"):

STUFF	Frequency	Percent	Cum Freq	Cum Percent
-9	10	0.15	10	0.15
-7	2	0.03	12	0.18
0	3441	50.24	3453	50.42
1	1810	26.43	5263	76.84
2	1586	23.16	6849	100.00

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IF SUBJECT DOES NOT GIVE ANY RESPONSE FOR AT LEAST 15 SECONDS, OR SUBJECTS SAYS "I DON'T KNOW", YOU MAY GIVE THE FOLLOWING PROMPT **EACH TIME THE PERSON SHOWS THIS BEHAVIOR**:

Please show me all the steps that are involved in paying this bill properly and getting it ready to mail.

D4i. PROMPT GIVEN?　　　　　YES……….1　　　　　NO……….2

BILLP	Frequency	Percent	Cum Freq	Cum Percent
-9	12	0.18	12	0.18
-7	2	0.03	14	0.20
1	4031	58.86	4045	59.06
2	2804	40.94	6849	100.00

D4j. **IF D4i IS "Yes",** HOW OFTEN WAS PROMPT GIVEN? (CIRCLE ONE):

　　　1　　2　　3　　4　　5　　6　　7　　other (specify) _____

HOFTEN	Frequency	Percent	Cum Freq	Cum Percent
-9	24	0.35	24	0.35
-7	2	0.03	26	0.38
-1	2804	40.94	2830	41.32
1	1988	29.03	4818	70.35
2	1114	16.27	5932	86.61
3	598	8.73	6530	95.34
4	244	3.56	6774	98.90
5	46	0.67	6820	99.58
6	15	0.22	6835	99.80
7	10	0.15	6845	99.94
8	1	0.01	6846	99.96
9	1	0.01	6847	99.97
10	1	0.01	6848	99.99
12	1	0.01	6849	100.00

D5. **RECORD OTDL END TIME NOW:** _____ _____: _____ _____ **AM\PM**