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Observed Tasks of Daily Living Scoring Manual (OT Served Tasks of Daily Living)

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Observed Tasks of Daily Living Scoring manual for the OTDL

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1. Introduction to the purpose and scoring of the OTDL

The OTDL (Observed Tasks of Daily Living) questionnaire represents an attempt to observe the behavior of adults while they are performing selected tasks of daily living. Specifically, items in the OTDL represent 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. However, these recorded behaviors are not enough information to decide whether individuals have performed well or poorly on the OTDL tasks. In order to determine the quality of participants' performance on the OTDL, the OTDL needs to be **scored** before it is data entered.

This manual explains how to score the OTDL.

2. General scoring rules for the OTDL

Study participants' performance on the OTDL, observed during an interview with ACTIVE testers, is recorded at the most detailed level. Subsequent scoring is also highly detailed. This approach has the advantage that it preserves the detailed information and allows later recoding to any other scale.

The reponses to many of the OTDL items are conceptualized as <u>sequences of single</u> <u>behavioral units</u> which can be clearly distinguished from each other and which, taken together, form a more complex behavioral response to an everyday problem situation. The behavioral steps involved in responding to an everyday task have been clearly identified, and each step is coded as either <u>correct</u> or <u>incorrect</u>. Some items may also be coded as <u>partially correct</u> (i.e., they receive less than full points). In addition, testers record (and scorers also code) whether a study participant received a prompt from the tester. In a later stage (computerized scoring), partial credit will be deducted for prompted responses. Scorers, however, need only to record whether a response was prompted or not.

The important job of the scorer is to assign scores to individual items. Total scores for a particular task, and for the total OTDL, are generated later by computer. The specific rules for assigning scores to individual items are outlined in Section 4 of this coding manual.

In general, the maximum score for a task can be achieved only if a study participant performed <u>all behavioral steps correctly</u>, and if they were performed in the <u>correct sequence</u>. If a study participant's response was only partially correct because not all steps had been performed or they had been performed in an incorrect sequence, then this will be reflected in a score that is less than the maximum score possible.

3. Item-by-item scoring and recording rules

- Scores for each item should be recorded directly on the OTDL booklet. Where the OTDL is a two-sided booklet, scores for items on the left-side page should be written in the left-side margin, directly next to box containing that item. Scores for items on the right-side page should be written in the right-side margin, directly next to the box containing that item.
- ACTIVE conventions apply for the scoring. Scores must be written with a <u>black pen</u>, in large, legible numbers. If a score is revised or changed, the original score must be circled and crossed out with a <u>single diagonal line</u>, and the change must be <u>dated and initialed</u> (with scorer initials). The new score is then written directly next to the old score, also in black ink.
- For all items, an uncompleted/blank field, or a field where more than one answer has been erroneously recorded, must be coded as -9 (missing).
- For all items, a tester note indicating that the subject refused to complete the item must be coded as -8 (refused).
- Paraphrases are allowed. Hence, if the correct answer in this manual is listed as "Take in eight hour intervals", answers like "every eight hours", "once every eight hours", "when eight hours have passed", etc. would all be coded as correct.
- <u>Prompt rule</u>: Prompts should be coded as "Yes" if they have been circled, <u>or</u> if tester notes indicate that they had to answer a question about how to solve the item.
- <u>Scratch paper rule</u>: Code use of Scratch paper as "Yes" when subject requests or uses extra paper to work out figures, or when subject writes in the margins of the OTDL booklet.

Item-Specific Scoring Instructions

Item #	Subject Behavior	Score	Comments
B1	FINDS/POINTS TO TAGAMET:		This step has to come
	YES	1	first.
	NO	0	
B1a	PROMPT GIVEN		See Prompt Rule
	YES	1	
	NO	2	
B2	SUBJECT SAYS "30 Days" or "1		
	Month"		
	YES	1	
	NO	0	
B2a	PROMPT GIVEN		See Prompt Rule
	YES	1	
	NO	2	
В3	FINDS/POINTS TO INDOCIN:		For B3 and B4, the order
	YES	1	in which the participant
	NO	0	finds the medications is
			not important.
B3a	PROMPT GIVEN		See Prompt Rule
	YES	1	_
	NO	2	
B4	FINDS/POINTS TO MOTRIN:		For B3 and B4, the order
	YES	1	in which the participant
	NO	0	finds the medications is
			not important.
B4a	PROMPT GIVEN		See Prompt Rule
	YES	1	_
	NO	2	
В5	SUBJECT SAYS "Indocin and Motrin		In order to get full
	may cause drowsiness"		credit, the participant
	YES	2	needs to give the names
	NO, with tester note that subject said		of both medications
	"Indocin" only	1	
	NO, with tester note that subject said		
	"Motrin" only	1	
	NO, with no indication by tester that		
	subject said either "Motrin" or "Indocin"	0	
B5a	PROMPT GIVEN		See Prompt Rule
	YES	1	
	NO	2	

Item #	Subject Behavior	Score	Comments
В6	SUBJECT SAYS "Up to 8 tablets"		
	YES	1	
	NO	0	
B6a	PROMPT GIVEN		See Prompt Rule
	YES	1	
	NO	2	
В7	SUBJECT SAYS "In 4 hour intervals"		"4 hours" is the
	OR "Every 4 Hours"	1	critical piece
	YES NO	1 0	
B7a	PROMPT GIVEN	U	See Prompt Rule
D/a	YES	1	Sec 1 fompt Kuic
	NO	2	
B8	SUBJECT SAYS: "She should contact		
20	her physician immediately"		
	YES	1	
	NO	0	
B8a	PROMPT GIVEN		See Prompt Rule
	YES	1	
	NO	2	
В9	SUBJECT WRITES "Blue Cross Health		The participant must
	Insurance" IN THE INSURANCE		write the company
	SECTION OF THE FORM.	4	name/abbreviation
	YES	1	(BCBS, Blue Cross) in
B9a	NO NO	0	the space after insurance See Prompt Rule
Б9а	PROMPT GIVEN YES	1	See Prompt Rule
	NO	2	
B10a	SUBJECT MARKS/CHECKS "Yes"		Participant can get credit
Diva	NEXT TO THE QUESTION "HAVE		for correctly answering
	YOU EVER HAD ANY		this item even if B10b
	COMPLICATIONS WITH		was not done correctly
	ANESTHESIA?"		J
	YES	1	
	NO	0	
B10b	SUBJECT WRITES "Unstable Blood		Participant can get credit
	Pressure" IN THE "PLEASE		for correctly answering
	DESCRIBE" SECTION	4	this item even if B10a
	YES	1	was not done correctly
D10	NO NO	0	C D + D - 1
B10c	PROMPT GIVEN	1	See Prompt Rule
	YES NO	1 2	
	NU	2	

Item #	Subject Behavior	Score	Comments
C1	SUBJECT FINDS/POINTS		This step has to come
	TO/EXAMINES HOUSING SECTION		first.
	YES	1	
	NO	0	
Cla	PROMPT GIVEN		See Prompt Rule
	YES	1	
	NO	2	
C2	SUBJECT DIALS AND CALLS OUT		The participant has to
	<u>"471-2096"</u>		dial and say this
	YES	1	number; just saying the
	NO NO	0	number does not suffice.
C2a	PROMPT GIVEN	1	See Prompt Rule
	YES	1 2	
C3	NO SUBJECT FINDS/POINTS		This stan has to some
C3	TO/EXAMINES HOSPITAL		This step has to come first.
	PHARMACY ADVERTISEMENT		IIISt.
	YES	1	
	NO	0	
C3a	PROMPT GIVEN		See Prompt Rule
054	YES	1	see I rompt reare
	NO	2	
C4	SUBJECT DIALS AND CALLS OUT		The participant has to
	"776-5486"		dial and say this
	YES	1	number; just saying the
	NO	0	number does not suffice.
C4a	PROMPT GIVEN		See Prompt Rule
	YES	1	
	NO	2	
C5	SUBJECT FINDS/POINTS		This step has to come
	TO/EXAMINES CORRECT ("Discount		first.
	from Full Rate")TIME PERIOD ON		
	THE RATE CHART	1	
	YES	1	
C.F.	NO NO	0	C D (D1
C5a	PROMPT GIVEN	1	See Prompt Rule
	YES	1	
	NO	2	

Item #	Subject Behavior	Score	Comments
C6	SUBJECT SAYS "The Discount from		The participant has to
	Full Rate Charge"		say the rate name; just
	YES	1	pointing does not
	NO	0	suffice.
C6a	PROMPT GIVEN		See Prompt Rule
	YES	1	
	NO	2	
D1a	\$3.15 COUNTED AS: 3-\$1.00 BILLS		For D1a-D1e, various
	+ 1 DIME + 1 NICKEL		combinations can lead to
	YES	4	a correct answer.
	NO	0	Hence, <u>one</u> of these
D1b	\$3.15 COUNTED AS: 3-\$1.00 BILLS		items is likely to be
	<u>+ 3 NICKELS</u>		coded as "yes", and all
	YES	4	the others are likely to
	NO	0	be coded "no". Zeroes
			on one item (e.g., D1a)
D1c	\$3.15 COUNTED AS: 2-\$1.00 BILLS		still permit a "4" to be
	+ 4 QUARTERS + 3 NICKELS		assigned for another
	YES	4	item in the set (e.g.,
	NO	0	D1c). A score should be
D1d	\$3.15 COUNTED AS: 3-\$1.00 BILLS		assigned for ALL FIVE
	+ 4 QUARTERS + 1 DIME + 1 NICKEL		PARTS of the D1
	YES	4	question. Just saying
	NO	0	"\$3.15" does not get
D1e	<u>OTHER</u>		credit. The change
	YES, and tester indicates that		must be physically
	combination equalled \$3.15	4	counted out.
	YES, and tester indicates that		
	combination did not equal \$3.15	0	
	NO	0	
D1f	PROMPT GIVEN		See Prompt Rule
	YES	1	
	NO	2	
D1g	SCRATCH PAPER USED		See Scratch Paper rule
	YES	1	
	NO	2	

Item #	Subject Behavior	Score	Comments
D2	IN D2a SUBJECT WRITES COLUMN		Although D2/D3 are
	ENTRY OF \$50 IN CREDIT/DEPOSIT		clearly set up so that the
	<u>AND BALANCE = \$781.50</u>		participant does the
	<u>or</u>		deposit first, and then
	IN D2b SUBJECT WRITES COLUMN		the withdrawal, the
	ENTRY OF \$29.21 IN DEBIT/WITH-		alternative order is
	DRAWAL AND BALANCE = \$702.29		permissible. Hence,
	YES	2	subjects will either do
	NO, but Balance Is Correct	1	D2a then D2b, or D3a
	NO, but Column Entry Is Correct	1	then D3b.
	NO, neither balance nor column entry is		Scores will be assigned
	correct	0	both for correctly using
D2c	PROMPT GIVEN		the transaction record
	YES	1	(i.e., putting the right
	NO	2	numbers in the right
D3	IN D3a SUBJECT WRITES COLUMN		columns), and for
	ENTRY OF \$29.21 IN DEBIT/WITH-		correctly performing the
	DRAWAL AND BALANCE = \$752.29		arithmetic balancing
	<u>or</u>		operations (i.e., coming
	IN D2b SUBJECT WRITES COLUMN		up witht he right
	ENTRY OF \$50 IN CREDIT/DEPOSIT		balances).
	$\underline{AND BALANCE} = \752.29		Subject behavior on
	YES	2	EITHER D2a-D3a OR
	NO, but Balance Is Correct	1	D2b-D3b should be used
	NO, but Column Entry Is Correct	1	to assign a score to the
	NO, neither balance nor column entry is		D2 and D3 items.
	correct	0	
D3c	PROMPT GIVEN		See Prompt Rule
	YES	1	
	NO	2	
D3d	SCRATCH PAPER USED		See Scratch Paper rule
	YES	1	
	NO	2	

Item #	Subject Behavior	Score	Comments
D4a	SUBJECT WRITES IN DATE AND		Two pointsone for date
	YEAR ON CHECK		and one for year. The
	YES	2	date and year put in
	NO, Writes Only Date	1	are irrelevant. "July
	NO, Writes Only Year	1	16, 1886" or "Jan. 1,
	NO, Writes Neither Date Nor Year	0	2046" would get "2".
D4b	SUBJECT WRITES IN PAY TO THE		Small typos, like
	ORDER FIELD "Grand City Edison"		"Grant City Edison"
	YES	1	or "Grand Edison"
	NO	0	still receive "1"
D4c	SUBJECT WRITES AMOUNT IN		
	NUMBERS "29.21"		
	YES	1	
	NO	0	
D4d	SUBJECT WRITES AMOUNT IN		Acceptable alternative
	WORDS "Twenty-nine and 21/100"		is "Twenty-nine and
	YES	1	21"
	NO	0	
D4e	SUBJECTS SIGNS OWN NAME AT		Any signature, even a
	SIGNATURE LINE		fictitious one, receives
	YES	1	"1"
	NO	0	
D4f	SUBJECT WRITES UTILITY		Three points: one for
	ADDRESS ON ENVELOPE:		name, one for PO Box,
	Grand City Edison (Line 1)		and one for city/US/zip
	P.O. Box 7150, (Line 2)		
	Grand City, US 12345 (Line 3)		
	YES	3	
	NO, but two (2) lines are written	3 2 1	
	NO, but one (1) line is written		
	NO, None of the lines are written	0	
D4g	SUBJECT WRITES IN RETURN		Three points: one for
	<u>ADDRESS</u>		name, one for street, one
	Name (Line 1)		for city/state/zip;
	Street/Apt (Line 2)		Fictitious return
	City, State, and Zip Code (Line 3)		address receives full
	YES	3	credit, but saying "I
	NO, but two (2) lines are written	2	would write an address
	NO, but one (1) line is written	1	here" or "I would use
	NO, None of the lines are written	0	a stamp" receives "0".

Item #	Subject Behavior	Score	Comments
D4h	SUBJECT		Two points: one for
	• TEARS RETURN PORTION OF		tearing bill portion and
	BILL AND PLACES CHECK AND		placing in envelope, and
	RETURN PORTION OF BILL INTO		one for sealing the
	ENVELOPE (Step 1)		envelope (licking or
	• AND SEALS IT. (Step 2)		folding flap in).
	YES	2	Subjects who say "I
	NO, but one (1) step is done	1	would seal it", but
	NO, None of the steps is done	0	don't seal, still get
			cred.
D4i	PROMPT GIVEN		See Prompt Rule
	YES	1	
	NO	2	
D4j	IF D4i IS "Yes", HOW OFTEN WAS		Prompt D4i is a little bit
	PROMPT GIVEN? (Skip this if D4i is		different, as it may be
	"No")		given many times. If the
	Record Number of Times Circled	7	prompt is given (Yes is
		6	circled in D4i), the tester
		5	must indicate how often
		4	in D4j. Record the
		3	number of times the
		3 2 1	prompt was given in the
		-	margin ONLY if
		other	D4i=Yes. If $D4i=Yes$,
			but D4j was forgotten,
			code this item as -9

4. Edit procedure after data entry

Scoring should proceed based on all available information. Hence, the tester should provide to the scorer BOTH the OTDL coding booklet and additional OTDL evidence (check and bill portion in envelope, balance statement, medical history form). Although tester recording on the OTDL booklet should provide a complete record, sometimes it may be useful to inspect the additional evidence to make a coding decision. (For example, to verify if the envelope was truly sealed in D4h, look at it). The most complex item to score is the balance sheet, so it is often very useful to have this available for inspection.

Sometimes, occasionally through data recording errors, missing or implausible values will appear on the OTDL booklet. The scorers should code the OTDL booklet according to the available evidence, and should not try to infer or correct tester behavior. Thus, if an uncodable or missing response appears, it should be coded as -9.

At data entry, these -9 codes (or other implausible codes) will be flagged and returned to the tester in an edit report. The tester should correct or verify the value, and then return the OTDL to the scorer. The scorer should verify scores before returning for data entry.

In some cases, edit reports will be generated due to scorer errors, rather than tester errors. In these cases, the tester is unlikely to be able to resolve the edit report, and the scorer will do edit report resolution when he/she receives the edit report.

All revised scores that result as a result of the edit report process should be recorded according to ACTIVE conventions: Scores must be written with a <u>black pen</u>, in large, legible numbers. If a score is revised, the original score must be circled and crossed out with a <u>single diagonal line</u>, and the change must be <u>dated and initialed</u> (with scorer initials). The new score is then written directly next to the old score, also in black ink.

In addition, the scorer should make a note of the revised score on the edit report (or should validate the existing score), and initial and date these changes. This resolved edit should then be returned to data entry.