 <small>Canadian Longitudinal Study on Aging Étude longitudinale canadienne sur le vieillissement</small>	Title:	Performing a DCSatHOME Interview		
	Version Date:	2017-FEB-23	Document Number:	SOP_DCS_0059_2
	Effective Date:	2017-MAY-15		
Data Collection Site (DCS)	Version:	1.1	Number of Pages:	9

1.0 Purpose:

The purpose of this document is to describe the standardized procedure for the DCSatHOME Interview.

2.0 Scope:

This document is to be used by DCS/IH staff when performing a DCSatHOME Interview.

3.0 Responsibilities:

It is the responsibility of the staff to perform the procedures as described in the current and approved version of the standard operating procedure.

4.0 Related Documents:

- **SOP_DCS_0056** - Assessing Accommodation Needs & Scheduling IH or DCS Interviews
- **SOP_DCS_0059_1** – Preparing for a DCSatHOME Interview
- **DOC_DCS_0059** – DCSatHOME Interview Equipment Checklist
- **MAN_DCS_0207** – Beartooth F1, V2.0 Interviewer and + Technical Manual
- **SOP_DCS_0003** – Confidentiality
- **SOP_DCS_0053** – In-Home Check-in Procedures SOP
- **MAN_GEN_0223** – Proxy Process Guidance Manual
- **DOC_DCS_0201_1** – Contraindication Questionnaire - Medical Terms
- **DOC_DCS_0201_2** – Contraindications Questionnaire – Guidance Manual
- **SOP_DCS_0005** – Hip and Waist Circumference
- **SOP_DCS_0006** – Standing Height and Weight Measurement
- **SOP_DCS_0061** – Tanita Body Composition Analyzer BF-350
- **SOP_DCS_0008** – Heart Rate and Blood Pressure Measurement
- **SOP_DCS_0012** – Spirometry
- **SOP_DCS_0042** - Spirometer SOP – Calibration and Maintenance
- **SOP_DCS_0019** – Neuropsychological Battery DCS
- **SOP_DCS_0028** – Hand Grip Strength

- **SOP_DCS_0047** - Tracker Grip Strength Machine SOP – Calibration and Maintenance
- **SOP_DCS_0029** – Timed-based Prospective Memory Test (TMT)
- **SOP_DCS_0075** - TMT Clock SOP – Calibration and Maintenance

5.0 Definitions:

Not applicable

6.0 Equipment:

- Equipment travel cases
- DCSatHOME Laptop
- Signature pad (if participant is ≥ 70)
- Measuring Tape
- Stadiometer
- Tanita
- BpTRU Vital Signs Monitor
- Blood pressure cuffs
- TruFlow Easy-on Spirometer
- Hygrometer
- External headset with microphone
- Timer
- Large Clock
- Tracker Freedom Wireless Grip dynamometer

7.0 Supplies:

- Barcode
- Extension cord/Power bar
- DCS Pocketbook
- Alcohol wipes
- Mouthpieces (*Spirette*)
- Nose clips
- Certainty Wipes
- Cavi Wipes
- DCSatHOME SOP, CRF, Questionnaire, Calibration logs and Training Manual Binder (To be left in the car)
- DCSatHOME test binder containing
 - **DOC_DCS_0042_4** - DCSatHOME Easy on-PC Spirometer Log for Test Environment
 - Event-based PMT envelope with money
 - Neuropsychological Questionnaire Response cards
 - Envelope containing numbered cards for TMT
 - Stroop stimulus cards (set of 3) – **DO NOT LAMINATE**
 - Disease Questionnaire Response cards
 - Paper Proxy Forms
 - Paper Proxy Information packages

8.0 Procedure Steps:

- The DCSatHOME Interview must be completed with a DCSatHOME laptop.
- Sites may decide to have 2 staff members attend the DCSatHOME interview.

- Use the **comments** sections in ONYX to note any issues, events or distractions that may have impacted the measures completed. i.e.: participant's phone rings during neuropsychological testing.

Step 1: When greeted at the participant's home, thank the participant for allowing you to come to their home. Ask the participant to take you to the area where the interview will be completed. Inform the participant that you will require a few minutes to set up some of the equipment for the visit.

- Ensure that the participant answers all of the questions (e.g., yes, no, don't know, refuse). A spouse or partner may be present, but it is preferred that the participant and the interviewer have some privacy while completing the interview and tests to avoid distractions.
- If interviewing a participant with special needs, then refer to the **Participants with Special Needs** section of *SOP_DCS_0053 - In-Home Check-in Procedures SOP*.

Step 2: Set up the laptop and signature pad (if required) on the table.

Step 3: Locate the closest power outlet to the work surface provided and plug in the extension cord/power bar.

Step 4: Assemble and set-up the stadiometer on a hard, flat surface.

NOTE: If participant is in a wheelchair or it is apparent that they cannot stand unassisted skip to **Step 9**.

Step 5: Remove the Tanita from the travel case and set up using *SOP_DCS_0061 - Tanita Body Composition Analyzer BF-350*.

Step 6: Remove the DCSatHOME Test Binder, measuring tape, blood pressure monitor, hygrometer and spirometer and set them within arm's length of the DCSatHOME laptop on the work surface.

NOTES:

- Ensure that cords for all of the equipment are connected to the equipment and the power source; you will need to plug each piece of equipment into the laptop one at time when you are ready to use it.
- If a participant is in a wheelchair or it is apparent that they cannot stand unassisted only set up the blood pressure machine.

Step 7: The DCSatHOME laptop has a secured log in, when you turn on the laptop you will get a black screen asking for a password, at this screen enter password 1.

Step 8: Click on the **Admin** icon and enter password 2.

Step 9: You should now be at the Windows home page. Click on the Onyx DCS icon, when prompted enter your ONYX user name and password.

Step 10: In Onyx click on the **Participants** tab.

Step 11: Click on **Appointments of the day**.

Step 12: Find the participant's name in the list and click on **Receive**.

Step 13: Ask the participant to verify the following information and compare it with the information in the computer system:

- Participant's name;
- Date of birth; and
- Address.

The screenshot shows a 'Volunteer Registration' form with the following fields and values: First Name: Panda; Last Name: Bear; Birth Date: 20.04.1965; Gender: Female; Honorific: Ms; Other/Nickname: (empty); Address: Street: 2 Briarose; City: Hamilton; Postal code: L9V2B3; Province: ON; Email: PBear@gmail.com. A note at the bottom states: 'When you signed your consent, we asked if you would be willing to provide us with a blood and urine sample when you visited the data collection site. These samples are stored for use by researchers in the future. At the time that you completed your consent, you indicated that you:'

The screenshot shows the 'Volunteer Registration' form with consent and contact information fields: Consent to draw blood: Choose One; Consent to take urine: Choose One; Next of kin: First name, Last name, Gender (Choose One), Phone; Next of kin address: Street, City, Postal code, Province; Scan an interview ID; Add comment if needed.

Step 14: Ask the participant to verify their emergency contact information, which is already in Onyx (see 'Next of Kin' screenshot above).

Step 15: Enter the participant barcode ID and assign it to the participant. Click on **Save**.

Step 16: Inform the participant that during the course of their DCSatHOME visit they will have to:

- Answer questionnaires;
- Complete general and physical measurements/tests (weight, height, heart rate, blood pressure, body mass index, grip strength, etc.).

Step 17: If the participant doesn't have any additional questions, commence the DCSatHOME interview.

Step 18: In Onyx click **Interview**.

Step 19: If the participant's age is 70 years and over you will need to complete 'Proxy Consent' stage in Onyx.

- If the participant had a proxy consent in Mastodon, a new consent only needs to be done if HIN or blood consent is changing from 'no' to 'yes'.
- If the participant did not have a proxy consent but wants to set one up at this interview refer to *SOP_DCS_0055 – Proxy Consent*.

Completing Participant Measurements

Step 20: At the *Interview Tab* in Onyx, look for Contraindications in the list of stages, select **Start** in that row.

Step 21: Enter the Interview ID barcode, click **Continue**, confirm the participant language, then click **Next**.

Step 22: Let the participant know that we are asking these questions so that we will know if they had been able to come to the site which measurements they would have been eligible for. Read the participant all of the questions and record their responses in Onyx. When complete press **Finish**, then **Continue**.

Step 23: Using the measurement SOP indicated in the table below, complete the measurements in the order they are listed in.

NOTE: After completing each stage press **Finish**, then **Continue**.

Measurement	Equipment Set Up	SOP Required to Complete Measurement	
		Number	Name
Hip and waist Circumference	N/A	SOP_DCS_0005	Hip and Waist Circumference
Standing height	Set up the stadiometer on a hard level floor, if not already set up. NOTE: Stadiometer cannot be placed on carpeted surfaces or a hard surface over a carpeted floor.	SOP_DCS_0006	Standing Height and Weight Measurement (<i>Standing Height section of SOP only</i>)
Body composition and weight	Set up the Tanita on a hard level floor, if not already set up. NOTE: Tanita cannot be placed on carpeted surfaces or a hard surface over a carpeted floor.	SOP_DCS_0061	Tanita Body Composition Analyzer BF-350
Blood pressure	Plug the VSM BpTRU blood pressure machine into the laptop. NOTE: Measurement should be taken on left side.	SOP_DCS_0008	Heart Rate and Blood Pressure Measurement
Spirometry	Plug in the TruFlow Easy-on Spirometer into the laptop.	SOP_DCS_0012	Spirometry

Step 24: On the desk top open the “*Altitude*” folder and locate the address for the current DCSatHOME interview.

Step 25: Enter the altitude in *DOC_DCS_0042_4 - DCSatHOME Easy on-PC Spirometer Log for Test Environment* in the DCS Test binder

Step 26: Obtain the temperature and humidity from the hygrometer and log these measurements in the *DOC_DCS_0042_4 - DCSatHOME Easy on-PC Spirometer Log for Test Environment* in the DCS Test binder.

Step 27: At this point the participant may need a break, inform the participant that you have to pack up the equipment used so far and set up for the next portion of the DCSatHOME Interview.

Step 28: Put away all equipment used in the first half of the interview, excluding the DCSatHOME test binder.

Step 29: On the work surface set out the grip strength and plug the wireless portion into the laptop.

Step 30: Using the measurement SOP indicated in the table below, complete the measurements in the order they are listed in.

NOTE: After completing each stage press **Finish**, then **Continue**.

Measurement	Equipment Set Up	SOP Required to Complete Measurement	
		Number	Name
Event PMT STROOP FAS Neuropsychological Q.	NA	SOP_DCS_0019	Neuropsychological Battery DCS (Skip Task 4 – Choice Reaction Time Test (CRT) section of SOP)
NOTE: The <i>Functional Status</i> and <i>GenHealth Questionnaires</i> may need to be completed to allow the full 30 minutes on the Event PMT timer, continue in this SOP until the timer runs out and then return to the Event PMT stage in Onyx.			

Step 31: At the *Interview* Tab in Onyx, look for Functional Status in the list of stages. Then select **Start** in that row.

Step 32: Enter the Interview ID barcode, select **Continue** and **Next**.


Step 33: Proceed with the Functional Status stage. Ask participant all of the questions, and record their response in Onyx. Select **Finish** and **Continue**.

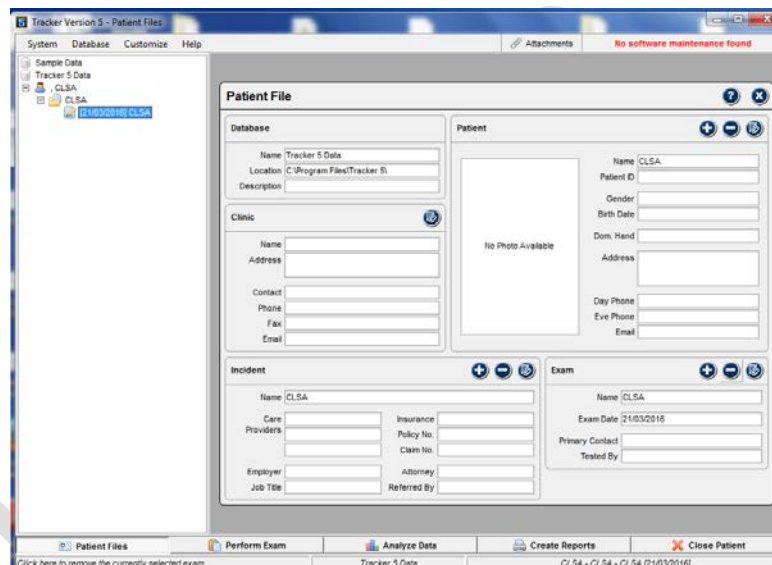
Step 34: Repeat **Steps 31 – 33** to complete the GenHealth stage.

Step 35: Using the measurement SOP indicated in the table below, complete the measurements in the order they are listed in.

NOTE: After completing each stage press **Finish**, then **Continue**.

Measurement	Equipment Set Up	SOP Required to Complete Measurement	
		Number	Name
Grip Strength	Plug the Tracker Freedom Wireless Grip dynamometer into the laptop.	SOP_DCS_0028	Hand Grip Strength
<p>NOTE: Grip strength may be run using a chair with arms SO LONG AS the arms on the chair do not interfere with the participants ability to position their arm at a 90° angle and their arm does not rest on the chairs arm rest. Grip strength cannot be run in ONYX due to security measures required on the laptop. To complete the grip strength measurement:</p> <ul style="list-style-type: none"> • Minimize Onyx. • On the windows desktop double click on the Tracker 5 icon. • Click the Perform Exam button. • Complete Steps 6-14 in <i>SOP_DCS_0028 – Hand Grip Strength</i>. • In Onyx open the <i>Grip Strength</i> stage. • Press Start, then Refresh, participant results should appear. 			

- Press **Next**, then **Finish**, then **Continue**.
- Minimize Onyx and return to Tracker 5.
- Click *Patient Files* tab.
- In the window on the left click the file name that reads: *[dd/mm/yyyy]CLSA* to select the exam. If this is not showing click the CLSA folder, then the CLSA sub-folder and the file should appear.
- In the *Exam* window, click the  button.
- Click **Ok** on the pop up window.
- In the menu bar click **System**, then **Exit** to close the program.



TMT Disose R Step 36 e	Place the large clock on the work surface.	SOP_DCS_0029	Timed-based Prospective Memory Test
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peat **Steps 31 – 33** to complete the OSEA stage.

NOTE: The Elder abuse module will be programed to skip for all participants.

Step 37: At this point the DCSatHOME interview is complete. Please thank the participant using the script below if needed.

***[INSERT PARTICIPANT'S FIRST NAME]**, thank you for your time and for welcoming me in your home today. One of our researchers will contact you in approximately 18 months to update your contact information. In three years you will have another in-home interview and a full DCS visit.*

*The **[your site]** will send you your Participant Report, by mail, in 4-6 weeks.*

***[If the participant is 70 years old or older and has now consented to Proxy, say]**
You will also receive a copy of your signed proxy consent.*

Step 38: Shut down the laptop **without opening** the *Conclusion* stage.

Step 39: Carefully pack ALL of the equipment and supplies into the travel cases, ensuring that nothing is left behind.

At the DCS

Step 40: Turn on the laptop, connect it to the internet and log in using **Steps 7-9**.

Step 41: Until the print function is working, the NCC will be printing off the Physical measures report and proxy consent to send to the participant. This will be done on a monthly basis.

Step 42: At the *Interview Tab* in Onyx, look for Conclusion in the list of stages. Then select **Start** in the “Actions” in that row.

Step 43: Enter the participant’s ID and select **Continue** and then **Next**.

Step 44: At the “Conclusion” window, verify the language and choose **Next**.

Step 45: Check off consent form and Physical measures report, then choose **Next**.

Step 46: Click **Finish**. The *Conclusion: Finish* window will pop up.

Step 47: Indicate in the **comment** field in Onyx if there was anything that may have affected or influenced the measurement. Ensure that comments do not contain any personally identifying information.

Step 48: Click **Continue** to return to the status page.

NOTE: The participant file is now complete and you will not be able to modify any of the information.

Step 49: Mail-out the Participant’s report and the Proxy consent (if needed) to the participant.

Step 50: Destroy the **barcode by shredding it**.

Step 51: Export the visit.

9.0 Documentation and Forms:

- **CHA_DCS_0006_1** – Height Conversion Chart (metric to imperial)
- **CHA_DCS_0006_2** – Weight Conversion Chart (metric to imperial)
- Participant Consent for Proxy Decision Maker and Proxy Information Provider Contact Form
- Participant Consent for Proxy Decision Maker and Proxy Information Provider Contact Information Package
- Paper copy of Data Collection Site Questionnaire (Follow Up 1)
- Paper copy of all CRFs for all measurements & questionnaires listed in this SOP

10.0 References:

- **CHA_DCS_0059** – DCS at Home Visit Flow

F1 Revision History:

New Version #	Revision Date	Revision Author	Content Approval
1.1	2017-FEB-23	Lorraine Moss	Mark Oremus
Summary of Revisions			
Updated section 9.0			
Added Printing a Proxy Consent section			

FOLLOW-UP 1