

**United Nations Statistics Division
United Nations Children's Fund
Statistical Office of the European Communities
Centres for Disease Control and Prevention
of the United States of America**

ESA/STAT/AC.81/R-1
23 May 2001

**International Seminar on the
Measurement of Disability**

**New York
4-6 June 2001**

*Herman Van Oyen:
Selection of a Coherent Set of Health Indicators.
Limitations in usual activities, a global approach*

Discussion paper : session 3 : instruments

Selection of a Coherent Set of Health Indicators

A First Step Towards

A User's Guide to Health Expectancies for the European Union

Edited by J-M Robine, C. Jagger and V. Egidi

Chapter 3: Limitations in usual activities, a global approach

Contributors: Rom Perenboom, Herman Van Oyen, Loes van Herten



Montpellier (France), Euro-REVES, June 2000

Contributors:

- V. Buratta, ISTAT, Rome, Italy - E-mail: Buratta@istat.it
- E. Cambois, INSERM, Montpellier, France - E-mail: cambois@valdorel.fnclcc.fr
- V. Coutton, INSERM, Montpellier, France - E-mail: coutton@valdorel.fnclcc.fr
- M. Crawford, Imperial College, School of Medicine, London – E-mail: m.crawford@ic.ac.uk
- V. Egidi, ISTAT, Rome, Italy - E-mail: Egidi@istat.it
- R. Gispert, Generalitat de Catalunya, Barcelona, Spain - E-mail: rgispert@dsss.scs.es
- C. Jagger, Leicester Univ., Leicester, UK - E-mail: cxj@le.ac.uk
- G. Looman, Erasmus Univ., Rotterdam, The Netherlands - E-mail: looman@mgz.fgg.eur.nl
- W. Nusselder, Erasmus Univ., Rotterdam, The Netherlands - E-mail: nusselder@mgz.fgg.eur.nl
- R. Perenboom, TNO, Leiden, The Netherlands - E-mail: rjm.perenboom@pg.tno.nl
- N. Rasmussen, Danish Institute for Clinical Epidemiology, Copenhagen, Denmark - E-mail: nkr@dike.dk
- K. Ritchie, INSERM, Montpellier, France - E-mail: ritchie@valdorel.fnclcc.fr
- JM Robine, INSERM, Montpellier, France - E-mail: robine@valdorel.fnclcc.fr
- D. Sanderson, Danish Institute for Clinical Epidemiology, Copenhagen, Denmark - E-mail: dms@dike.dk
- J. van den Berg, CBS, Heerlen, The Netherlands - E-mail: jbrg@cbs.nl
- L. van Herten, TNO, Leiden, The Netherlands - E-mail: LM.vanherten@pg.tno.nl
- H. van Oyen, Hygiene and Epidemiology Institute, Brussels, Belgium - E-mail: herman.vanoyen@epinov.ihe.be

Project administrator:

- I. Romieu, , INSERM, Montpellier, France - E-mail: iromieu@valdorel.fnclcc.fr

Contact:

Equipe INSERM Démographie et Santé - Val d'Aurelle
Parc Euromédecine - 34298 Montpellier cedex 5 - France
Tel: +33 (0) 467 61 30 27 ; Fax: +33 (0) 467 61 30 47
e-mail: iromieu@valdorel.fnclcc.fr

This project is supported by the European Commission

Chapter 3: Limitations in usual activities, a global approach

Contributors: Rom Perenboom, Herman Van Oyen, Loes van Herten

Section 1: Definition and presentation of the proposed measurement instrument

1. Defining the concept of a Global Activity Limitation Indicator: (GALI)

A Global Activity Limitation Indicator (GALI, previously referred to as Global Disability Indicator (Verbrugge, 1997) is defined as an instrument that is able to identify subjects, in both general and/or specific populations, who perceive themselves to have long-standing, health-related limitations (restrictions) in the usual activities.

According to the draft ICIDH-2 an activity is defined as: *'the performance of a task or action by an individual'* and thus activity limitations are defined as *'the difficulties the individual experience in performing an activity'* (World Health Organization, 1999). Within the framework of the ICIDH-2, limitations should be due to a health condition.

In the definition of the GALI, the term "usual activities" refers to the fact that the limitations in the performance of actions and tasks are assessed against a generally accepted population standard, relative to cultural and social expectations.

2. Defining the measure

The aim of a GALI-instrument is to estimate the perception of the activity limitations within a population using a concise set of questions and preferably a single question. The conciseness of the instrument, defined by the number of questions (between 1 and 3 questions maximum), the length of the questions and the response categories should be its main strength. Other criteria a GALI should meet are:

1. Presence of long-standing limitations: duration at least 6 months
2. Cause of activity limitation: a general health problem
3. Usual activities : the reference is to activities people usually do
4. Severity of limitations: inclusion of full range in the response with at least three levels
5. No preceding screening for health conditions

The justification for these criteria is given in more detail in section 2 of this chapter.

3. Policy relevance and utility

There are two main reasons to develop a GALI for public health policy. First, due to the ageing of populations and the change in the morbidity-profile to chronic health conditions, simple information on health has to be extended with a concise instrument which provides policy makers with easily obtainable information on the **perception of activity limitations** that could result in a need for support. Further activity limitations may lead to disadvantages in social participation.

Instruments to measure limitations in usual activities are normally complex (multi-item) instruments. The output of these instruments depends on the specific activities included. In different countries or surveys different instruments are used, making comparisons almost impossible.

Secondly, similar to the concept of perceived health, there is a search for developing a global single question instrument to measure these activity limitations, independently of the type of activity, the specific life situations, the kind of health problem causing the activity limitation, specific age groups, sexes or other subgroups.

A single question instrument should make it more acceptable for countries and researchers to include it in their different surveys, making comparison between countries and subgroups possible.

Although in surveys the activity limitations are never observed, the proposed instrument is not intended to measure the exact amount of observable nor the type of activity limitations in a community. The instrument will allow estimation of the number of persons in a population that perceive themselves to have limitations in their activities, estimating the prevalence of the perceived activity limitations of that population.

It can be expected that the perception of the activity limitations is of more relevance to health policy, because the health care needs and consumption depend to a large extent on the perception of health problems. A similar relationship is found between global self-perceived health status and health care (ambulatory or hospital) consumption.

4. Proposed Global Activity Limitations Indicator

The wording of the proposed instrument to estimate the Global Activity Limitations Indicator is as follows :

For the past 6 months or more have you been limited in activities people usually do because of a health problem ?
Yes, strongly limited
Yes, limited
No, not limited

Depending on the type or the objectives of the survey and the need for more information, the GALI instrument can be extended by additional questions providing information on the life situations in which the activities are limited, on the causes of the activity limitation and on the use of personal assistance and/or devices. Those extensions of the GALI are given in an annex to this chapter.

5. Population category

In order to provide good estimates of the perceived activity limitations of a population, this instrument should be administered to a general population of all ages or to special groups within a population. The wording of the proposed instrument does not relate to any age group in particular. The simple wording should also allow administration in institutionalized populations.

6. Health expectancy

The instrument permits calculation of an Activity Limitation Free Life Expectancy. The introduction of three response categories (not limited, limited and strongly limited) will allow testing of the plausibility of the scenario of a dynamic equilibrium (Manton, 1982).

Section 2: Background

I. History of the instrument

Scientific discussion on a 'Global Disability Indicator' started during the 9th REVES meeting in Rome (1996), as a result of extensive E-mail discussions (Verbrugge and van den Bos, 1996) and has been further elaborated by Verbrugge (Verbrugge, 1997). The purpose of this section is to continue this development and to justify the proposal of an instrument to define a global activity limitation indicator.

The 'Global Disability Indicator' was little related to any conceptual framework. The revision of the ICIDH - ICIDH-2 Beta 2 draft, (World Health Organization, 1999) - gives us an opportunity to better relate a Global Activity Limitations Indicator to a conceptual framework (see chapter 2, section 1). In the current draft of the revision, activity limitations are defined as the difficulties the individual experiences in performing an activity, due to a health condition. Activity is defined as: *'the performance of a task or action by an individual'*. The activity dimension of the ICIDH-2 gives a profile of an individual's functioning in terms of activities, from simple to complex ones, and deals with the actual performance of the individual. The activity limitations are assessed against a generally accepted population standard, relative to cultural and social expectations.

The following steps were taken in developing the proposal for a GALI :

- the conceptual framework of the ICIDH-2, and previous work in the framework of REVES was used to develop a set of criteria for evaluation of candidate GALI instruments ;
- instruments were collected for evaluation by a Medline search, over the time period 1990-1999 and using key words disability/measurement/activity limitations, and by an extensive E-mail survey among experts in the field of disability research ;
- instruments were qualitatively screened for a set of criteria (tables 1 and 2);
- selection of existing or the creation of a new instrument to be proposed ;
- if a new instrument is to be created, the evaluation of the instrument against the same criteria.

The different instruments were reviewed based on some critical conceptual and practical criteria (tables 1 and 2). The instruments reviewed are given in detail in part 3.

In the subsequent section, we will give a brief introduction of the conceptual criteria. For the practical criteria we refer to the standard methodological literature (Verbrugge, 1997).

Table 1: Conceptual criteria

- | |
|---|
| <ol style="list-style-type: none"> 1. A concise set of questions: between 1 and 3 questions maximum ; 2. Presence of long-standing limitations: duration at least 6 months ; 3. Cause of activity limitation: a general health problem ; 4. Usual activities: the reference is to activities people usually do ; 5. Severity of limitations: inclusion of full range in the response with at least three levels ; 6. No preceding screening for health conditions ; |
|---|

Table 2: Practical criteria

<ol style="list-style-type: none"> 1. Questions compact and in simple words; 2. Same instrument for total population (including institutionalized population) ; 3. Same instrument for all age categories ; 4. To be used without further explanation or instructions ; 5. To be used in self administered, face-to-face or telephone survey ; 6. To be used in general, health and disability surveys ; 7. No comparison with same age group, sex or with previous periods ; 8. Validated ; 9. If necessary the GALI can be extended by sub-questions, indicating specific life situations: school/work, house, leisure time ; 10. Specific question for identification of the health causes of the activity limitation ; 11. Specific question for use of devices or assistance ;
--

1 A concise set of questions: between 1 and 3 questions maximum

The aim of a GALI-instrument is to estimate the perception of activity limitations within a population using a concise set of questions and preferably a single question. The conciseness of the instrument, defined by the number of questions, the length of the questions and the response categories should be its main strength. This should facilitate, in a similar way compared to the single question instrument on self-perceived health, the use in both general and health or disability surveys. However one should also be aware that the conciseness is at the same time also a drawback as the validity of such an instrument may be lower due to a smaller differentiation rate and the problems related to translating complex concepts into a single simple statement.

2 Presence of long-standing limitations: duration at least 6 months

The purpose of the instrument is to measure the presence of long-standing limitations, as the consequences of these limitations (e.g. care, dependency) are more serious. Although not empirically based, a 6 months period is often used to define chronic or long-standing diseases in surveys. Other authors use a duration of 3 months to define chronicity of a disease (van den Bos, 1989) however for activity limitations this period seems too short, as it also includes short-term limitations with a period of rehabilitation. We will define long-standing as a time period of 6 months or more. The time period refers to the duration of the activity limitation and not of the health condition, as the focus of a GALI instrument is on the activity limitations and not as much on the health problems.

3 Cause of activity limitation: a general health problem

The GALI should refer to health-related problems as cause of the limitations. The indicator is not meant to measure limitations due to financial, cultural or other none health-related causes. To be general, specification of health concepts (e.g. physical and mental health) should be avoided. Existing instruments sometimes refer only to physical health problems, other instruments to physical and mental health problems and a few of them to additional problems, mainly combined in one question, but often in up to three specific questions. This makes comparison more difficult.

4 Usual activities : the reference is to activities people usually do

People with long-standing limitations due to health problems, have passed through a process of adaptation. This may result in a selection or reduction of the set of activities they do. In order to identify the existing limitations a reference is necessary. Although some instruments include an explicit external reference to the age-group of the subject, this is not preferred. Therefore the activity limitations are assessed against a generally accepted population standard, relative to cultural and social expectations by referring only to activities ***people usually do***.

This is consistent with the self-perceived health instrument (see next chapter) and gives no restrictions by culture, age, gender or the subjects own ambition.

5 Severity of limitations: inclusion of full range in the response with at least three levels

As mentioned above, one of the limitations of a concise instrument is a smaller differentiation rate. Therefore the response scale should cover the full range of severity levels, including the absence of limitations (Verbrugge, 1997). A two level scale (e.g. yes/no or limited/not limited) merely estimates the presence or absence of limitations, not the severity. However, one should be aware that the robustness of the scale does not allow too detailed categorisation. The calculation of health expectancies - including the possibility of testing for the plausibility of the dynamic equilibrium hypothesis (Manton, 1982) - requires at least a distinction between absence of limitations and the presence of mild and severe limitations.

6 No preceding screening for health conditions

The focus of the instrument is on limitation. A preceding screen for health conditions acts as a filter, introducing a selection, and will therefore not be used.

II. Measuring GALI, in Europe and elsewhere

To collect GALI candidates, an inventory study was carried out with the work of Verbrugge forming the starting point (Verbrugge, 1997; Verbrugge and van den Bos, 1996). After this, a Medline search was carried out over the time period 1990-1999 and using the key words disability/measurement/activity limitations. A short questionnaire was also sent to around 50 experts in the field of disability research, mostly members of the International Network on Health Expectancy (REVES) and the Euro-REVES 1 project. This questionnaire requested information on the existence of a 'global disability indicator' in the country of the respondent and the wording, the survey in which this indicator was included and scientific references.

These actions resulted in about 30 candidate GALIs. A first screening revealed that some instruments were almost identical. Some other instruments only referred to short-term limitations. The findings of the review of the 22 remaining instruments are presented in table 3 and a detailed description of these instruments is given in Part III. Table 3 also includes the results of the evaluation of the proposed GALI instrument and the extended GALI instrument against the criteria.

III. Essential characteristics of the instrument

To meet the criteria of tables 1 and 2, the ideal instrument should :

- have only 1 item ;
- refer to long-standing activity limitations (6 months or more) ;
- refer only to general health problems ;
- refer to activities people usually do ;
- include at least three levels of severity ;
- in order to avoid selection, should not be preceded by a screening question on health problems ;
- be usable for all age categories (to calculate a uni-dimensional activity limitation free life expectancy starting from a certain age, preferably birth) ;
- be extendable by questions on causes, the use of personal or devices assistance and the life situations in which the activity limitations occurs.

For the evaluation following qualitative categories are used in table 3:

The number of questions: the number is given

Long-standing activity limitations:

- ++ : 6 months or more
- + : duration less than 6 months
- : duration not defined

Health related problems:

- ++ : general health problems
- + : specific health concepts (physical, mental)
- : no reference to health problems

Usual activity:

- ++ : usual activities without any specification or restriction
- + : usual activity within specific broad life situations
- : specific activities description

Rating (range of severity):

- + : 3 or more categories in the response categories
- : binary response categories (only presence or absence of activity limitations)

No preceding screener:

- + : there is no preceding screening question(s) on health problems
- : there is a preceding screener

Usable for all ages:

- + : usable for all ages
- : is age specific or has different questions for specific age groups

Causes included:

- + : has a question (often an open-ended question) to identify the health cause(s) (disease, condition, etc.) of the activity limitation
- : does not have such a question

Assistance:

- + : has a question on the use of personal and/or device assistance to carry out the activity
- : does not have such a question on this

Activity description:

- + : the activity limitation is assessed for a list of specific task or activities in the response categories
- : does not have such a list

Table 3: Results by comparing candidates (numbers 1 to 22)

	Reviewed instruments																						Proposed	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	GALI	GALI+ Optional questions
Number of questions	1	4	4	4	1	2	5	6	3	12	4	3	5	2	4	8	2	5	2	4	3	3	1	6
Long-standing limitations	-	+	-	-	-	-	-	-	+	-	-	-	-	-	++	-	++	-	+	++	-	-	++	++
Health related problem	-	+	+	+	++	+	+	+	-	++	+	++	+	++	++	+	+	+	++	++	++	++	++	++
Usual activities	-	++	+	++	++	++	+	+	+	+	+	+	+	+	++	+	+	+	+	+	++	+	++	++
Range of severity	+	+	-	-	+	-	+	+	+	-	-	-	+	-	-	-	-	-	-	-	+	+	+	+
No preceding screener	+	-	+	-	+	-	+	-	+	+	+	+	+	+	+	-	+	-	+	-	+	+	+	+
All ages	+	+	+	+	+	+	+	+	+	-	-	+	+	+	+	-	+	-	+	+	+	+	+	+
Causes included	-	+	-	+	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	+
Assistance	+	-	-	-	-	-	-	-	-	+	-	-	-	-	+	+	+	-	-	-	-	-	-	+
Activity description	+	-	-	-	-	-	-	-	-	-	+	-	-	-	-	-	-	-	-	-	-	-	-	-

Numbers 1 to 22 refer to candidates (for references see Part 3)

Score: see text

From this review of the 22 instruments the following conclusions can be drawn:

1. Only two instruments can be classified as single item instruments. Most instruments (12/22) had more than 3 questions.
2. Few instruments refer to long-standing limitations (6/22). Only 3 instruments refer to limitations that have lasted for 6 months or longer although it should be noted that some instruments in their wording refer to long-standing or chronic health conditions as a cause of limitations, but not to long-standing limitations.
3. Most instruments refer to health-related problems. Some instruments (10/22) refer to health in general (marked with ++). Other instruments (marked with +) (10/22) refer to specific health concepts (e.g. physical health and/or mental health).
4. Few instruments (6/22) refer to usual activities in a general way. Most instruments (15/22) refer to specific life situations (work/school, household, leisure).
5. Less than half the number of instruments (9/22) have a range of severity included in the response categories. Most instruments only register the presence or absence of limitations.
6. Instruments (7/22) with a preceding screen have the drawback that they only cover those persons with activity limitations that pass the screen. If a person has activity limitations, but does not pass the screen, he or she will not answer the question(s) on activity limitations.
7. Almost all instruments (19/22) do not have limits on age included. However, it is possible that some instruments are part of a questionnaire that is directed at specific age groups.
8. Almost no instruments (2/22) have causes included in the body of the instrument.
9. In some instruments (5/22) the use of personal assistance or assistance devices is part of the range of severity. In other instruments, a separate question on personal assistance or assistance devices is included.
10. In two questions a set of specific tasks and activities is explicitly mentioned in the question wording or in the response categories. This is a drawback, because it limits the possible limitations to be measured.

Regarding all criteria together, three instruments meet almost all of the criteria and particularly the criterion of long-standing limitations (numbers 15, 17 and 20). Two of these instrument (number 15 and 20) have four questions, one has only two questions. None of these instruments however include a simple range of severity in the response. Number 17 has the drawback that it refers to specific health problems (physical, mental, emotional, or communication-related condition) and refers to specific life situations (activities at home, school, work, or in the community), making the wording of the question rather complex.

IV. Conclusion

Since none of the instruments met all or most of the criteria in tables 1 and 2, a new instrument is proposed (see section 2 of this chapter). According to the criteria (tables 1-3):

- The proposed instrument is a global single item instrument. The additional questions (see annex) are optional. Within the concept of the ICIDH-2, the instrument makes no restriction on the type of activities for which a limitation exists. It also makes no restriction in the context in which the limitation is experienced (life situations as work, home, leisure time). However, it refers to general and not specific health-related problems.
- The question is concisely formulated. It focuses on limitations which are long-standing (in order to exclude short-term limitations), caused by non-specified health problems. The wording is simple and the terms used are straightforward and commonly understood: limitations, 6 months, activities people usually do. The only undefined concept is 'health'. Translation into different languages seems feasible.
- The wording is simple and compact, and usable in specific populations such as e.g. institutionalized populations.

- There is no comparison to external reference groups except a generally accepted population standard, relative to cultural and social expectations: ‘the activities people usually do’.
- Because there is no reference to specific type of activities, the same instrument can be used for subgroups in a population : age, gender, cultural. All these specific subgroups have their own usual activities.
- The proposed instrument has no preliminary screening question. The optional question about possible causes (see annex) should not be used as a preliminary screening question.
- Because the wording is straightforward, no introduction or explanation seems to be necessary.
- Because the wording is simple, application in different survey methods (face-to-face, postal or telephone) seems possible.
- As it is a single question instrument, it is especially suitable in general surveys. In health and particularly disability surveys it can be used as a screen.
- The instrument allows for optional questions (5 in number) to specify life situations in which the activity limitations occurs (3 questions: school/work, home, leisure time), to specify the health cause of the activity limitation (1 question) and to specify if assistance (personal or device) is used (1 question)

As the proposed indicator is a newly formulated question, it is not yet validated. Validation is foreseen in the next phase of the project (translation, sensitivity, specificity). The instrument is meant to be ‘general’ and therefore the health problem is not divided into specific dimensions such as physical or mental health. The purpose of the instrument is to measure long-standing limitations, since the consequences of these limitations (e.g. care, dependency) are more burdensome. In the response categories, a distinction is made in three levels of severity. These distinctions allow for more nuance (e.g. changes over time, comparison between groups) and also for testing the plausibility of different epidemiological scenarios: expansion of disability, compression of morbidity and dynamic equilibrium (Gruenberg, 1977; Kramer, 1980; Fries, 1980; Manton, 1982).

Annex: Optional additional questions:

Options : referring to specific life situations

Question 2 A :

For the past 6 months or more have you been limited in activities people usually do at school or work because of a health problem ?

Strongly limited

limited

Not limited

Question 2 B :

For the past 6 months or more have you been limited in activities people usually do at home because of a health problem ?

Strongly limited

limited

Not limited

Question 2C :

For the past 6 months or more have you been limited in activities people usually do during leisure time because of a health problem ?

Strongly limited

limited

Not limited

Question 3

Which health problem causes these limitations:

a. an accident/injury, namely.....

b a disease /disorder, namely.....

c. old age, namely....

d at birth, namely.....

e other cause, namely.....

f don't know.

Question 4

Do you use any kind of equipment or devices or do you use assistance from other people to carry out activities people usually do?

Yes, only equipment or devices

Yes, only assistance from people

Yes, both equipment or devices and assistance from people

No

Refusal

Do not known

No answer

3- Charts on Global Disability Indicator

1. Austria: Living conditions of persons aged 60 years or more (June 1998)

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

Frage 1:

Können Sie folgende Tätigkeiten normalerweise jeweils ohne Hilfe anderer Personen (unter Umständen mit Benützung eines Hilfsmittels) – nur mit Hilfe anderer Personen – oder überhaupt nicht (mehr) ausüben:

Aufstehen, Zubettgehen

sich waschen, anziehen

Essen, Trinken

in der Wohnung gehen

Stiegen steigen

leichte Hausarbeit

schwerere Hausarbeit

Einkaufen

Ausgehen, Besuche machen?

English translation

Question 1:

Are you able to carry out the following activities without help of other persons (auxiliary material like wheel chair possible) – only with help of other persons – not at all:

Getting in and out of bed

washing, dressing oneself

eating, drinking

moving within the flat, house

climbing up stairs

(physically) easier housework (f.e. sweeping)

(physically) harder housework (f.e. cleaning windows)

shopping

going out, making visits.

Review:

Number of questions : 1

Longstanding limitations : not considered

Health related problems : not considered

Usual activities : not considered

Range of severity : 3 categories

No preceding screener : yes

All ages : no specific age groups specified

Causes included : not considered

Use of assistance : personal assistance, no devices

Activity description : specific activities are proposed

Reference:

B. Wiederhofer (1998) Soziale Fragen: Senioren: Unterstützung durch Angehörige, Freunde, Soziale Dienste. Ergebnisse des Mikrozensus-Sonderprogramms

2. Belgium: Health Interview Survey, 1997

Presentation:

Reference wording (questions) or standardised examination (conditions)

Original language

Vraag 1:

Hebt u last van één of meerdere langdurige ziekten, aandoeningen of handicaps ? Ja, Nee naar vraag X

Vraag 2: Indien ja

Van welke langdurige ziekte(n), aandoening(en) of handicap(s) hebt u last ?

Vraag 3:

Bent u vanwege deze ziekte(n), aandoening(en) of handicap(s) belemmerd in uw dagelijkse bezigheden? Voortdurend, Af en toe, Niet of zelden

Vraag 4:

Bent u als gevolg van deze ziekte(n), aandoening(en) of handicap(s) bedlegerig? Voortdurend, Af en toe, Niet of zelden

English translation

Question 1:

Do you suffer from one or more longstanding illnesses, chronic conditions or handicaps ? Yes, No go to question X

Question 2:

From which longstanding illness(es), chronic condition(s) or handicap(s) do you suffer?

Question 3:

Are you restricted in you daily activities due to this (these) illness(es), chronic condition(s) or handicaps? Continually, At intervals, Not or seldom

Question 4:

Are you bedridden due to this (these) illness(es), chronic condition(s) or handicaps? Continually, At intervals, Not or seldom

Review :

Number of questions : 4

Longstanding limitations : not considered, reference is made to longstanding illness, conditions or handicap

Health related problems : specified in broad domains

Usual activities : daily activities, not specified

Range of severity : more than 3 categories of severity can be defined

No preceding screener : no, there is a selection for people with longstanding illness, conditions or handicap

All ages : no specific age groups specified

Causes included : there is an open question

Use of assistance : not considered

Activity description : not considered

Reference:

H. Van Oyen, Scientific Institute of Public Health (1997) *Belgian Health Interview Survey*. Bruxelles: SIPH

3. Canada: National Population Health Survey (NPHS), restriction of activities part

Presentation:

Reference wording (questions) or standardised examination (conditions)

Original language (a French version exists): Age => 12

The next few questions deal with any health limitations which affect ... daily activities. In these questions, "long-term conditions" refer to conditions that have lasted or are expected to last 6 months or more.

Question 1:

Because of a long-term physical or mental condition or a health problem, are/is ... limited in the kind or amount of activity you/he/she can do:

at home?

at school?

at work?

in other activities such as transportation to or from work or leisure time activities? Yes, No, Not applicable

Comments

Note by L. Verbrugge: The two global items differ slightly from their predecessors in the Census, HALS 1, and HALS2.

With marginal different wordings or with less additional questions this GDI candidate is almost the same as NPHS, 94-95, Canadian Census of Population 1986, Canadian Health and Activity Limitation Survey 1986-1987, Canadian Health and Activity Limitation Survey 1991, Global disability items of the National Population Health Survey Canada 1994-1995, The Filter-questions Canadian Health and Activity Limitation Survey 1986 and 1991 and the proposed Filter-questions Canadian Health and Activity Limitation Survey 2001.

Note by the authors: the initial indicator question is followed by questions about disabilities and handicaps, causes and personal assistance or assistive devices used.

Review :

Number of questions : 4

Longstanding limitations : not considered, reference is made to longstanding illness, conditions or handicap

Health related problems : specified in broad domains

Usual activities : specified in four life situations

Range of severity : no

No preceding screener : there is no screener

All ages : no specific age groups specified

Causes included : not considered

Use of assistance : not considered

Activity description : not considered

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362

4. Great Britain: General Household Survey for Great Britain (2000)

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

Question 1:

Do you have any long-standing illness, disability or infirmity? By long-standing, I mean anything that has troubled you over a period of time or that is likely to affect you over a period of time? Yes, No.

Question 2:

What is the matter with you?

Question 3:

How many longstanding illnesses or infirmities does respondent have?

Question 4:

Does this illness or disability (Do any of these illnesses or disabilities) limit your activities in any way? Yes, No.

Review :

Number of questions : 4

Longstanding limitations : not considered, reference is made to longstanding illness, conditions or handicap

Health related problems : specified in broad domains

Usual activities : not specified: your activities

Range of severity : no, dichotomous

No preceding screener : no, there is a selection for people with longstanding illness, conditions or handicap

All ages : no specific age groups specified

Causes included : not considered

Use of assistance : not considered

Activity description : not considered

5. International: REVES Harmonisation Committee

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language:

Because of your health, are you usually limited in your daily activities, apart from personal care?

Fully able to perform any activity (apart from personal care),

Severely limited in daily activities,

Slightly limited in daily activities,

Not limited in daily activities.

Comment

Note by L. Verbrugge: The International Network on Health Expectancy (dubbed REVES) is a collection of researchers engaged in methodological and analytical studies of disability. A committee has worked to develop brief questions about functional domains. Two forms of the proposed question on occupation (role) disability are shown (Chamie 1990).

Review :

Number of questions : 1

Longstanding limitations : not considered

Health related problems : holistic approach, not specified

Usual activities : not specified: daily activities

Range of severity : yes, in four categories

No preceding screener : there is no preceding screener

All ages : no specific age groups specified

Causes included : not considered

Use of assistance : not considered

Activity description : not considered

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362.

6. International: European Community Health Panel

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

Question 1:

Do you have any chronic physical or mental health problem, illness or disability? Yes, No.

Question 1a: If Yes:

Are you hampered in your daily activities by this physical or mental health problem, illness or disability? Yes, No.

Comment

Note by L. Verbrugge: A panel study is being conducted in 15 European countries. The global disability item is a followup Q for persons with chronic health problems broadly stated.

Review :

Number of questions : 2

Longstanding limitations : not considered

Health related problems : specified in broad domains

Usual activities : not specified: daily activities

Range of severity : no, dichotomous

No preceding screener : no, there is a selection for people with longstanding illness, conditions or handicap

All ages : no specific age groups specified

Causes included : not considered

Use of assistance : not considered

Activity description : not considered

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362.

7. The Netherlands: Permanent Onderzoek Leefsituatie (POLs) (first version)

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

Belemmeringen Kind (alleen als leeftijd <12 jaar)

Vraag 1:

Heeft het kind een langdurige ziekte, aandoening of handicap die hem of haar beperkt bij activiteiten op school, het spelen of andere activiteiten die normaal zijn voor een kind van zijn of haar leeftijd? ja, nee, weigert/weet niet

Leeftijd >12 jaar

Belemmeringen Thuis

Vraag 1:

Bent u, als gevolg van een langdurige ziekte, aandoening of handicap belemmerd bij het uitvoeren van dagelijkse bezigheden thuis? ja, nee, weigert/weet niet

Belemmeringen Werk (alleen gevraagd indien aantal werkuren >11 of als opleiding _voltijd)

Vraag 2:

Bent u, als gevolg van een langdurige ziekte, aandoening of handicap belemmerd bij het uitvoeren van dagelijkse bezigheden op school of op het werk? ja, nee, weigert/weet niet

Belemmeringen Anders

Vraag 3:

Bent u, als gevolg van een langdurige ziekte, aandoening of handicap belemmerd in uw vrijetijdsbesteding, bij het sporten of het reizen? (zoals van en naar werk of school gaan) ja, nee, weigert/weet niet

Langdurige Aandoeningen

Vraag 4:

Heeft u last van één of meer langdurige ziekte(n), aandoening(en) of handicap(s)? ja, nee, weigert niet (na het eventueel vermelden van 1-4 langdurige aandoeningen)

Belemmeringen dagelijkse bezigheden

Vraag 5:

Bent u als gevolg van deze ziekte(n), aandoening(en) of handicap(s) belemmerd in de dagelijkse bezigheden? Voortdurend, met tussenpozen, niet of zelden, weigert niet

English translation (by RP)

Limitation children (age <12 only)

Question 1:

Has the child one or more longterm disease, disorders or handicaps that limits him or her in activities at school, in playing or other activities, normal for a child of his or her age? Yes/no?

Limitations at home

Question 1

Are you, due to a longterm disease, disorder or handicap limited in your daily activities at home? Yes/no

Limitations at work (only asked when working hours > 11 per week, or if full-time education)

Question 2:

Are you, due to a longterm disease, disorder or handicap limited in your daily activities at work or at school? Yes/no

Limitations other activities

Question 3

Are you, due to a longterm disease, disorder or handicap limited in leisure time activities, in sporting or traveling (to and from work, school?) Yes/no

Longterm disorders:

Do you have one or more longterm diseases, disorders or handicaps? Yes/no

(after mentioning 1 to 4 longterm disorders):

Limitations daily activities:

Are you because of this/these disease(s), disorder(s) or handicap(s) limited in your daily activities? always, sometimes, (almost) never

Review :

Number of questions : 5 (to estimate activity limitations)

Longstanding limitations : not considered, reference is made to longstanding illness, conditions or handicap

Health related problems : specified in broad domains

Usual activities : specified in broad life situations (school, work, household)

Range of severity : no, dichotomous

No preceding screener : no preceding screener included

All ages : different questions for different age groups

Causes included : not considered

Use of assistance : not considered

Activity description : not considered

References

Ooijendijk WTM, Geurts J (1998) *De ontwikkeling van een globale beperkingen indicator*. Manuscript.

8. The Netherlands: Permanent Onderzoek Leefsituatie (POLS) (second version)

(will be included in the Dutch new Permanent Survey on the Life Situation (including health) (januari 2001))

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

Als leeftijd <12 jaar:

Vraag 1: Heeft uw kind last van één of meer langdurige ziekte(n), aandoening(en) of handicap(s)? ja, nee, weigert/weet niet

Vraag 2: Indien ja:

In welke mate wordt uw kind hierdoor belemmerd bij activiteiten op school, het spelen of andere activiteiten die normaal zijn voor een kind van zijn of haar leeftijd? sterk belemmerd, licht belemmerd, niet belemmerd

Als leeftijd \geq 12 jaar:

Vraag 3: Heeft u last van één of meer langdurige ziekte(n), aandoening(en) of handicap(s)? (ook ouderdomsklachten of specifieke ouderdomsziekten tellen mee) ja, nee, weigert/weet niet

Vraag 4: Indien ja:

In welke mate wordt u hierdoor belemmerd bij het uitvoeren van dagelijkse bezigheden thuis? sterk belemmerd, licht belemmerd, niet belemmerd, weigert/weet niet

Vraag 5: In welke mate wordt u hierdoor belemmerd bij het uitvoeren van dagelijkse bezigheden op school of op het werk? sterk belemmerd, licht belemmerd, niet belemmerd, weigert/weet niet

Vraag 6: In welke mate wordt u hierdoor belemmerd in uw vrije tijdsbesteding, bij het sporten of het reizen ? (zoals van en naar werk of school gaan)? sterk belemmerd, licht belemmerd, niet belemmerd, weigert/weet niet

English translation (by RP)

If age < 12:

Question 1: Does your child suffers from a longterm disease, disorder or handicap? Yes, no

Question 1a: if yes:

How much is your child limited by this in activities at school, in playing or other activities, that are normal for a child of his of her age? very limited, a bit limited, not limited

If age \geq 12

Question 2: Do you suffer from one or more longterm disease(s), disorder(s) or handicap(s) (also due to old age or age related diseases): yes no

Question 2a: If yes:

How much are you limited by these in your daily activities at home? very limited, a bit limited, not limited

Question 2b: How much are you limited by these in your daily activities at school or at work? very limited, a bit limited, not limited

Question 2c: How much are you limited by these in your leisure time activities in sporting or travelling (to and from work or school)? very limited, a bit limited, not limited

Review :

Number of questions : 6 (to estimate activity limitations)

Longstanding limitations : not considered, reference is made to longstanding illness, conditions or handicap

Health related problems : specified in broad domains

Usual activities : specified in broad life situations (school, work, household)

Range of severity : yes, in three categories

No preceding screener : no, there is a selection for people with longstanding illness, conditions or handicap

All ages : different questions for different age groups

Causes included : not considered

Use of assistance : not considered

Activity description : not considered

9. The Netherlands: Peilingen WVG

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

Ernst belemmeringen

In welke mate bent u belemmerd bij het uitvoeren van dagelijkse bezigheden thuis?

Gaat het: met enige moeite, met grote moeite, alleen met hulp van anderen

Duur belemmeringen

Hoe lang bent u inmiddels belemmerd bij het uitvoeren van dagelijkse bezigheden thuis?

Minder dan 6 maanden, van 6-12 maanden, van 1-3 jaar, van 3-5 jaar, langer dan 5 jaar

Inclusief psychische problemen

Bent u als gevolg van langdurige lichamelijke en/of psychische problemen, aandoeningen of handicaps belemmerd bij het uitvoeren van

English translation (by RP)

Severity of limitations

Question 1

How much are you limited in your daily activities? Is it:

with some trouble

with a lot of trouble

only with help of others

Question 2

Duration of limitations

How long are you limited in your daily activities?

less than 6 months

6 months – 1 year

1 year – 3 year

3 year – 5 year

more than 5 years

Question 3

Inclusion of mental problems:

Because of a longterm physical and /or mental problem, disorder or handicap, are you limited in activities.....

Review :

Number of questions : 3

Longstanding limitations : Yes, in 5 categories from short term to more then 5 years

Health related problems : No reference to health related problems

Usual activities : not specified: daily activities

Range of severity : yes, in three categories

No preceding screener : no preceding screener included

All ages : no specific age groups specified

Causes included : not considered

Use of assistance : not considered

Activity description : not considered

References

Ooijendijk WTM, Geurts J (1998) *De ontwikkeling van een globale beperkingen indicator*. Manuscript.

10. USA: National Health Interview Survey U.S. (NHIS)

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

For Ages <5

Question 1: Is ... able to take part at all in the usual kinds of play activities done by most children ... age? Yes, No.

Question 2: If Yes:

Is ... limited in the kind or amount of play activities ... can do because of any impairment or health problem? Yes, No.

Question 3: If No:

Is ... limited in any way in any activities because of an impairment or health problem? Yes, No.

For Ages 5-17

Question 4: Does any impairment or health problem now keep ... from attending school? Yes, No.

Question 5a to c: If No:

[There are three further Qs about attending special school, needing to attend special school, or limited in school attendance.]

Question 6: If No to all four questions (4 and 5a to c):

Is ... limited in any way in any activities because of an impairment or health problem? Yes, No.

For Ages 18-69

Question 7: If Keeping house:

Does any impairment or health problem now keep you from doing any housework at all? Yes, No.

Question 8: If No:

Are you limited in the kind or amount of housework you can do because of any impairment or health problem? Yes, No.

Question 7: If Working:

Does any impairment or health problem now keep ... from working at a job or business? Yes, No.

Question 8: If No:

Is ... limited in the kind or amount of work ... can do because of any impairment or health problem? Yes, No.

Question 7: If Keeping house, going to school, something else:

Does any impairment or health problem keep you from working at a job or business? Yes, No.

Question 8: If No:

Are you limited in the kind or amount of work you could do because of any impairment or health problem? Yes, No.

Question 9: If No to all questions asked:

Are you limited in any way in any activities because of an impairment or health problem? Yes, No.

For all persons ages 60+ AND persons ages 5-59 who are limited in main or secondary activity:

Question 10:

Because of any impairment or health problem, does ... need the help of other persons with personal care needs, such as eating, bathing, dressing, or getting around this home? Yes, No.

Question 11: If No and also age 18+:

Because of any impairment or health problem, does ... need the help of other persons in handling routine needs, such as everyday household chores, doing necessary business, shopping, or getting around for other purposes? Yes, No.

Question 12: If No and also Age 70+:

Is ... limited in any way in any activities because of an impairment or health problem? Yes, No.

Comment

Note by L. Verbrugge:

- "an" impairment or health problem instead of "any".

-NHIS annually has a set of questions about limitations in principal role (called major activity) and other activities (called secondary activities). A respondent's age and stated major activity determine which limitation questions are asked. From this diverse questioning approach, a single analytic variable with four categories is created that applies to everyone: unable to carry on major activity, limited in kind or amount of major activity, limited in secondary activities only, not limited in major or secondary activities. Here, we have condensed the question set (see copy of NHIS for actual sequence). The survey is being redesigned (new format 1996) and the questions may change.

-Definition of Main Activity: Persons ages 18+ are asked What was ... doing most of the past 12 months: working at a job or business, keeping house, going to school, or something else? This is called the person's major activity. It determines which limitation questions are asked and their sequence. For children ages <5, major activity is assumed to be play; for children ages 5-17, school.

Definition of Secondary Activities: Persons all ages who report no limitation in major activity are then asked about limitation in any other activities. These are called secondary activities.

Review :

Number of questions : 12

Longstanding limitations : Not considered.

Health related problems : Not specified, holistic

Usual activities : specified in broad life situations (work, school, household)

Range of severity : no

No preceding screener : no preceding screener included

All ages : specific questions for specific age groups

Causes included : not considered

Use of assistance : one question directed at personal assistance.

Activity description : only as examples.

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362.

11. USA: Disability questions in U.S. Census of Population 1990

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

Question 1

Does ... have a physical, mental, or other health condition that has lasted for 6 or more months and which:

Limits the kind or amount of work ... can do at a job? Yes, No.

Prevents ... from working at a job? Yes, No.

Question 2:

Because of a health condition that has lasted for 6 or more months, does ... have any difficulty:

Going outside the home alone, for example, to shop or visit a doctor's office? Yes, No.

Taking care of his or her own personal needs, such as bathing, dressing, or getting around inside the home? Yes, No.

Review :

Number of questions : 4

Longstanding limitations : Not considered, reference is made to longstanding health problem.

Health related problems specified in broad concepts.

Usual activities : specified in broad life situations (work, personal care).

Range of severity : no.

No preceding screener : no preceding screener included

All ages : the questions refer to work/job, so children are not included.

Causes included : not considered

Use of assistance : not considered

Activity description : yes: work, job, going outside, taking care of personal needs.

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362.

12. USA: National Health and Nutrition Examination Survey III (NHANES III)

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

Question 1:

What were you doing most of the past 12 months:

working at a job or business,
retired,
keeping house,
going to school,
or something else?

Question 1a: If Working:

Are you limited in the kind or amount of work you can do because of any impairment or health problem? Yes, No.

Question 1b: If Keeping house or retired:

Are you limited in the kind or amount of housework you can do because of any impairment or health problem? Yes, No.

Question 1c: If Going to school or something else Or if no to above Q about Work/Housework:

Are you limited in any way in any activities because of an impairment or health problem? Yes, No.

Question 2: If Yes to any of above Q's:

Have you ever changed your job, stopped working, or made any changes in your housework because of a disability or health problem? Yes, No.

Comment

Note by L. Verbrugge: An increasing number of surveys take the NHIS limitations questions as their model, but modify them into shorter versions.

Review :

Number of questions : 3

Longstanding limitations : Not considered.

Health related problems: holistic approach.

Usual activities : specified in broad life situations.

Range of severity : no.

No preceding screener : no preceding screener included

All ages : no specific questions for specific age groups

Causes included : not considered

Use of assistance : not considered

Activity description : not considered.

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362.

13. USA: Survey of Income and Program Participation 1984 (SIPP)

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

For Ages 16-67

Question 1:

Does ... have a physical, mental, or other health condition which limits the kind or amount of work ... can do?

Question 1a: If Yes:

Does ...'s health or condition prevent ... from working at a job or business? Yes, No.

Question 2:

For Ages 68+ or If No to initial question (Ages 16-67):

Does ... have a physical, mental, or other health condition which limits the kind or amount of work ... can do around the house? Yes, No.

Question 2a: If Yes:

Does... 's health or condition completely prevent ... from doing work around the house? Yes, No.

Question 3:

For Ages < 6

Because of a physical, learning, or mental health condition, do any of ...'s children under 6 years of age have any limitations at all in the usual kind of activities done by most children their age? Yes, No.

Question 3a: For No, there is a follow-up Q about receipt of medical services for developmental needs.

Question 4:

For Ages 6-21

Because of a physical, learning, or mental health condition, do any of ...'s children between the ages of 6 and 21 have limitations in their ability to do regular school work? Yes, No.

Question 4a: For No, there are two followup questions about ever use and current use of special education services.

Question 5:

For Ages 3-14

Do any of ...'s children between the ages of 3 and 14 have a long lasting condition that limits their ability to walk, run, or use stairs? Yes, No.

Comment

Note by L. Verbrugge: The 1984 SIPP used NHIS as a model. Note the greater emphasis on children than in NHIS. There are complex checkpoints for these questions; we show their basic format.

Review :

Number of questions : 5

Longstanding limitations : Not considered.

Health related problems: specified by broad concepts.

Usual activities : specified in life situations for different age groups.

Range of severity : no.

No preceding screener : no preceding screener included

All ages : specific questions for specific age groups

Causes included : not considered

Use of assistance : not considered

Activity description : for age group 3 to 14 some specific activities mentioned.

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362.

14. USA: National Medical Expenditure Survey. 1987 (NMES)**Presentation :**

Reference wording (questions) or standardised examination (conditions)

Original language

Question 1

Does your health keep you from working at a job, doing work around the house, or going to school? Yes, No.

Question 2

Are you unable to do certain kinds or amounts of work, housework, or schoolwork because of your health? Yes, No.

Comment

Note by L. Verbrugge: The NMES questions have dual virtues of brevity and scope by combining job, housework, and school in one question. The item is from the self-administered questionnaire. Both Qs are asked for persons of all ages.

Review :

Number of questions : 2

Longstanding limitations : Not considered.

Health related problems: holistic approach.

Usual activities : specified in broad life situations

Range of severity : no.

No preceding screener : no preceding screener included

All ages : no specific questions for different age groups

Causes included : not considered

Use of assistance : not considered

Activity description : not considered

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362.

15. USA: Behavioral Risk Factor Surveillance System (BRFSS), 1995 Quality of Life/Functional Status (QOL/FS) Optional Module

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

Question 1:

Are you limited in any way in any activities because of any impairment or health problem? Yes, No.

Question 1a: If Yes:

For how long have your activities been limited because of your major impairment or health problem? Interviewer records respondent's statement of years/ months/days. [Question is preceded by a query about the "major" cause of limitation.]

Question 2:

Because of any impairment or health problem, do you need the help of other persons with your personal care needs, such as eating, bathing, dressing, or getting around the house? Yes, No.

Question 3:

Because of any impairment or health problem, do you need the help of other persons in handling your routine needs, such as everyday household chores, doing necessary business, shopping, or getting around for other purposes? Yes, No.

Comment

Note by L. Verbrugge:

-Uses "any" impairment or health problem, whereas NHIS uses "an". Same in all instances of this Q below.

-In Activity Limitation Module developed in 1993-94. Questions are worded closely to the NHIS activity limitations items.

-CDC has taken a lead in developing global disability items. BRFSS is a telephone interview of adults conducted by all U.S. states. It has a Core questionnaire and optional modules. #14 was introduced into the Core in 1993 and continues to be there (Centers for Disease Control and Prevention 1994, Hennessy et al. 1994).

Review :

Number of questions : 4

Longstanding limitations : Yes, (open question).

Health related problems: holistic approach.

Usual activities : holistic approach.

Range of severity : not considered.

No preceding screener : no preceding screener included

All ages : no specific questions for different age groups

Causes included : not considered

Use of assistance : yes

Activity description : not considered

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362.

Verbrugge LM, Merrill SS, Liu X (1995) *Measuring disability with parsimony: Proceedings of the 1995 Public Health Conference on Records and Statistics*. Hyattsville, MD: National Center for Health Statistics.

16. USA: Behavioral Risk Factor Surveillance System: Other QOL/FS Questions [drafted and considered by CDC staff]

Presentation :

Reference wording (questions) or standardised examination (conditions)

Question 1:

Now thinking about your health, do you have any physical or mental condition that limits you in any way, and that has lasted for 6 or more months? Yes, No.

Question 2: [For Ages 18-69:]

What were you doing most of the past 12 months: working at a job or business, keeping house, going to school, or something else? Working at a job or business, Keeping house, Going to school, Something else.

Question 2a: If Keeping house:

Does any impairment or health problem now keep you from doing any housework at all? Yes, No.

Question 2aa: If No:

Are you limited in the kind or amount of housework you can do because of any impairment or health problem? Yes, No.

Question 2b: If Working:

Does any impairment or health problem now keep you from working at a job or business? Yes, No.

Question 2bb: If No:

Are you limited in the kind or amount of work you can do because of any impairment or health problem? Yes, No.

Question 2c: If Keeping house, going to school, something else:

Does any impairment or health problem keep you from working at a job or business? Yes, No.

Question 2cc: If No:

Are you limited in the kind or amount of work you could do because of any impairment or health problem? Yes, No.

Question 3: If No to all questions asked:

Are you limited in any way in any activities because of any impairment or health problem? Yes, No.

Question 4: [For Ages 60+:]:

Question 4:

Because of any impairment or health problem, do you need the help of other persons with personal care needs, such as eating, bathing, dressing, or getting around this home? Yes, No.

Question 4a: If No:

Because of any impairment or health problem, do you need the help of other persons in handling routine needs, such as everyday household chores, doing necessary business, shopping, or getting around for other purposes? Yes, No.

Question 4aa: If No and also age 70+:

Are you limited in any way in any activities because of any impairment or health problem? Yes, No.

Review :

Number of questions : 8

Longstanding limitations : not considered.

Health related problems: holistic approach.

Usual activities : specified in broad life situations.

Range of severity : not considered.

No preceding screener : no preceding screener included

All ages : specific questions for different age groups

Causes included : not considered

Use of assistance : for specific age groups included.

Activity description : only considered as examples

17. USA: Behavioral Risk Factor Surveillance System (proposed)**Presentation :**

Reference wording (questions) or standardised examination (conditions)

Original language

Question 1:

Because of a physical, mental, emotional, or communication-related condition, have you been limited for the past 12 months in your activities at home, school, work, or in the community? Yes, No, Not sure/don't know, refused.

Question 2:

Do you use any kind of equipment or devices such as a hearing aid, wheelchair, cane, artificial limb, or do you use assistance from other people to carry out your activities at home, school, work, or in the community? Yes, No, Not sure/don't know, refused.

Review :

Number of questions : 2

Longstanding limitations : yes, 12 months.

Health related problems: specified in broad concepts.

Usual activities : specified in broad life situations.

Range of severity : not considered.

No preceding screener : no preceding screener included

All ages : no specific questions for different age groups

Causes included : not considered

Use of assistance : yes included.

Activity description : not considered

18. USA: National Health Interview Survey, Disability Supplement 1994-95

Presentation : Reference wording (questions) or standardised examination (conditions)

Original language

Question 1:

Do you consider yourself (or anyone in your family) to have a disability? Yes, No.

Question 2

Would other people consider you (or anyone in the family) to have a disability? Yes, No.

After specific questions about emotional/cognitive problems:

Question 3: If Yes to any:

During the past 12 months, did any of these problems seriously interfere with ... ability to work or attend school or to manage ... day-to-day activities? Yes, No.

After specific questions about emotional/cognitive problems and mental conditions:

Question 4: If Yes to any and also age 18+:

Because of (this/these) mental or emotional problem(s), is ... unable to work or limited in the kind or amount of work ... can do? Yes, No.

Question 4a: If No:

Because of (this/these) mental or emotional problem(s), does ... have trouble finding or keeping a job or doing job tasks? Yes, No.

For Ages 2-17

Question 5:

Because of a physical, mental, or emotional problem, do(es) ... now have any difficulty participating in strenuous activity, such as running or swimming, compared to other children their age? Yes, No.

Question 5b: If Yes:

Has the problem or condition which causes ... to have difficulty participating in strenuous activity been going on or is it expected to go on for at least 12 months? Yes, No.

For Ages 2-17:

Question 6:

Because of a physical, mental, or emotional problem, do(es) ... now have any difficulty playing or getting along with others their age? Yes, No.

Question 6a: If Yes:

Has the problem or condition which causes ... to have difficulty getting along with others been going on or is it expected to do on for at least 12 months?

Comment

Note by L. Verbrugge: The 1994-95 National Health Interview Survey had a Disability Supplement (NHIS-Disability) with two phases. Phase One has questions asked about all household members; it is conducted at the same time as the NHIS core questionnaire. Phase Two is for persons who screen-in as having disabilities; it is conducted several months later. NHIS-Disability has many detailed questions but only a few global ones. They are in Phase One and for All Ages except where stated. Note there are global questions related to mental (emotional & cognitive) problems, but none related to physical problems. Phase Two has no global items.

Review :

Number of questions : 5

Longstanding limitations : reference is only made to a time period of the past 12 months, not to duration.

Health related problems: specified in broad concepts.

Usual activities : specified in broad life situations.

Range of severity : not considered.

No preceding screener : no preceding screener included

All ages : specific questions for different age groups

Causes included : not considered

Use of assistance : for specific age groups included.

Activity description : not considered.

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362.

19. USA: Medical Outcomes Study Short-form Health Survey (MOS-20)

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

Question 1:

Does your health keep you from working at a job, doing work around the house or going to school?

Yes for more than 3 months;

Yes for 3 months or less;

No.

Question2:

Have you been unable to do certain kinds or amounts of work, housework or schoolwork because of your health?

Yes for more than 3 months;

Yes for 3 months or less;

No.

Comment

Note by L. Verbrugge: Shown here are the MOS-20 items for the concepts role functioning (#36; no skip pattern; both questions asked of all persons) and social functioning (#37). References for MOS20: Stewart et al. 1988; Ware, Sherbourne, and Davies 1992.

Review :

Number of questions : 2

Longstanding limitations : yes, but restricted to 3 months or more.

Health related problems: holistic approach.

Usual activities : specified in broad life areas.

Range of severity : not considered.

No preceding screener : no preceding screener included

All ages : no specific questions for different age groups

Causes included : not considered

Use of assistance : for specific age groups included.

Activity description : not considered.

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362.

20. USA: International Center for the Disabled Survey 1985 (ICDS)

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

Question 1:

Does a health problem, handicap or disability now keep you from participating fully in school, work, housework, or other activities? Yes, No.

Question 1a: If No:

Have you ever been limited in any way in your activities for a year or more because of a handicap, impairment, or health problem?

Yes-limited now,
Yes -limited in past,
No.

Question 1b: If Limited In Past:

Do you still have a disability or health problem, or not?
No longer have it (screens out),
Still have it.

Question 1c: If No:

Do you:

Question 1ca:

Have any learning disability of any kind, or not? Yes (questions stop at first Yes), No (screens out if No to all).

Question 1cb:

Have an emotional or mental disability, or developmental disability, or not?

Question 1cc:

Have a physical disability or handicap, or not? Yes (questions stop at first Yes), No (screens out if No to all).

Question 1cd:

Have any talking, hearing, or visual disability, except for ordinary eyeglasses, or not? Yes (questions stop at first Yes), No (screens out if No to all).

Comment

Note by L. Verbrugge. A first-stage screen for disability was done in a national telephone sample. Persons with long-term role limitations, certain long-term impairments, or self-perceived status as a "disabled or handicapped person" were selected. Screened-in persons were then contacted for an interview; the second-stage began with a check for disability status (#41; some persons screened out at that point). De last set of Qs shows three questions asked later in the second-stage interview. Reference: Louis Harris and Associates, Inc. 1986.

Review :

Number of questions : 4

Longstanding limitations : not considered.

Health related problems: holistic approach.

Usual activities : specified in broad life situations.

Range of severity : not considered.

No preceding screener : no preceding screener included

All ages : no specific questions for different age groups

Causes included : not considered

Use of assistance : not considered.

Activity description : not considered.

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362.

21. USA: Baltimore Longitudinal Study of Aging Followup

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

Question 1: Would you describe your overall level of functioning as: excellent, good, fair, poor, don't know?

Excellent

Good

Fair

Poor.

Question 2:

Has your ability to function or take care of yourself changed in the last 2 years? No, Yes.

Question 2a: If Yes:

Has your ability to function or take care of yourself improved or declined? Improved, Declined.

Question 3:

Does your health allow you to do everything you would like to do? No, Yes, Uncertain.

Question 3a: If No Or Uncertain:

What are you unable to do for yourself that you would like to do? [Interviewer writes respondent's description.]

Comment

Note by L. Verbrugge: BLSA is a life-long study of adults who have medical exams and questionnaires every two years. It is conducted by the Gerontology Research Center, National Institute on Ageing. Reference: Shock et al. 1984. The items are from a telephone follow-up on dropouts (had not returned for biennial exam) conducted in 1989.

Review :

Number of questions : 3

Longstanding limitations : not considered.

Health related problems: holistic approach.

Usual activities : refers to functioning in general.

Range of severity : yes, in four categories.

No preceding screener : no preceding screener included

All ages : no specific questions for different age groups

Causes included : not considered

Use of assistance : not considered.

Activity description : not considered.

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362.

22. USA: Pilot Study on Subjective Health, NCHS

Presentation :

Reference wording (questions) or standardised examination (conditions)

Original language

Question 1:

Is there anything about your physical condition-that is, your health and the amount of energy you have- that makes it hard for you to do your usual (work/activities)? Yes, No.

Question 1a: If Yes (Ask Both Below):

Would you say it is hard or very hard for you to do your usual (work/activities)? Hard, Very hard.

Question 1b

What are some of the things you have trouble with? [Interviewer writes responses.]

Comment

Note by L. Verbrugge: The items come from a small-scale pilot study (Subjective Health: Perceptions of Health Status and Health Care) conducted by Charles Cannell and colleagues for the National Center for Health Statistics in 1975. No publications.

Review :

Number of questions : 3

Longstanding limitations : not considered.

Health related problems: holistic approach.

Usual activities : usual activities.

Range of severity : yes, 3 categories: not limited, hard and very hard.

No preceding screener : no preceding screener included

All ages : no specific questions for different age groups

Causes included : not considered

Use of assistance : not considered.

Activity description : not considered.

References

Verbrugge LM (1997) A global disability indicator. *Journal of Aging Studies* 11 (4):337-362.