

## General Instructions

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This chapter provides a general orientation to the Form 90 interviews and includes charts and definitions that apply to all instruments. More detailed instructions for specific instruments are provided in the next chapter. Copies of all the forms and questionnaires cited here are in the appendix.

### Calendar

The calendar (fig. 1) is a key component of the Form 90 interview and should be carefully managed while completing the interview. The ultimate goal of using the calendar is to gather detailed and accurate data about self-reported drinking behavior over a specified time period. This involves gathering information about the quantity and potency of the beverages consumed as well as the actual dates on which drinking occurred. These particular dates on which drinking occurred are especially important when time-to-event statistical approaches are used to analyze followup data.

When conducting a Form 90 client interview, it is necessary to have a calendar form for recording data. This could be a regular blank calendar page (with holidays marked) or a computer-generated calendar. Project MATCH used the IBM-PC software CALENDAR CREATOR PLUS (CC+) for this purpose.\*

The CC+ software program generates blank calendar grids for any specified period of months and inserts a standard set of holidays and additional specified events onto the printed calendar. Thus, the calendar software can be updated with important news headlines and memorable local (e.g., sports) events.

If entries of this kind are logged into the master calendar datafile regularly, they can then be accessed (by calendar file printing) whenever an interviewer needs a retrospective calendar. Note that only more memorable events should be entered in order to avoid a confusing amount of detail on the calendar. The purpose is to aid, not confuse, the client.

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\* Version 2 is currently available from Softkey International, 201 Broadway, Cambridge, MA 02139-1901).

FIGURE 1.—Example of a filled-in calendar

# April

## 1995

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1 A 0
2 DAYLIGHT SAVINGS BEGINS A 0	3 0	4 0	5 Brother's Birthday P, 5.6	6 5.6	7 6.91	8 6.91
9 PALM SUNDAY 4.8	10 5.6	11 5.6	12 5.6	13 5.6	14 GOOD FRIDAY 6.91	15 Party 7 beer 10oz 7 whiskey 1oz 3-11 AM (-283) In 12.32
16 EASTER out of jail A 0	17 A 0	18 Bowling E, 9.60	19 OKLAHOMA BOMBING A 0	20 0	21 0	22 EARTH DAY 0
23 Anniv. 2 wine 4oz 6-8 PM (.032) 1.92	24 A 0	25 Bowling E, 9.6	26 A 0	27 0	28 ARBOR DAY 0	29 Today
30						

An efficient approach is to make multiple copies of the calendar grid for each month and keep them in stock. Interviewers can then easily assemble a Form 90 calendar by taking copies of the needed months. At the end of each month, a final blank calendar form for that month (containing its unique events) should be generated and added to the file.

## **Individual Day Boxes**

Each portion of a calendar day box is used for a particular kind of information (fig. 1).

Upper left: Date (may be automatically inserted by calendar software)

Upper right: Special day information (e.g., holiday, memorable event, which also may be automatically inserted by calendar software)

Center: Drinking information

Lower left: Institutionalization codes (see below)

Lower right: Information (when needed) about hours of drinking

## **Institutional Codes**

When clients are institutionalized for any of the following reasons, the matching code should be entered in the lower left corner of each appropriate day box:

Hm: Medical hospitalization

Htox: Hospital/medical detoxification

Rtox: Other residential, nonmedical detoxification

Ra: Alcohol treatment hospitalization

Rd: Drug treatment hospitalization

Rp: Emotional/psychological hospitalization

In: Incarcerated in jail or prison

Ambulatory detox days have no code and need not be recorded on the calendar.

**FIGURE 2.—Anchor dates for Form 90 interviews**

Type of interview	Starting date	Ending date
Intake (90-AI)	89 days before the last drink (not including the day of interview)	Outpatients: Yesterday Inpatients: Day before admission
First followup (90-AF) for outpatients	Date of first completed treatment session, or (if no treatment) 5 days after completion of the intake interview	Yesterday
First followup (90-AF) for inpatients	Date of discharge	Yesterday
Later followups (90-AF)	Date of last 90-AF (if done in the last 179 days) or target date for last missed 90-AF interview (if >179 days)	Yesterday
Reconstruction of a missed 90-AF interview	Date of last completed 90-AF	Day before target date of missed 90-AF interview

### Assessment Window

A specific period known as the “assessment window” (fig. 2) is accounted for at each Form 90 interview. The interviewer must make an entry in the center of every day box of this assessment window during the interview.

### Standard Drink Units

Drinking information obtained through the Form 90 interview is converted into standard drink units. The conventional drink unit used in all applications to date is the standard ethanol content (SEC) unit as defined by Miller, Heather, and Hall (1991; cf. Miller 1978), which is 0.5 oz (15 mL) of absolute alcohol. A simple way of calculating SEC units is the formula:

$$(x \text{ oz})(\% \text{ alcohol})(2) = y \text{ standard drinks}$$

**Examples:**

*Beer:*  $(48 \text{ oz})(.05)(2) = 4.8$  standard drinks

*Wine:*  $(16 \text{ oz})(.12)(2) = 3.8$  standard drinks

*80 proof spirits:*  $(6 \text{ oz})(.40)(2) = 4.8$  standard drinks

*86 proof spirits:*  $(6 \text{ oz})(.43)(2) = 5.2$  standard drinks

*100 proof spirits:*  $(6 \text{ oz})(.50)(2) = 6.0$  standard drinks

Halving of the number of SEC units yields the number of ounces of absolute ethanol consumed. Conversely, ounces of absolute ethanol can easily be converted (by doubling) into standard drink (SEC) units. It is equally feasible to use standard drink units other than the SEC. The software currently available for Form 90 computations accommodates metric units and other standard drinks of various sizes, as described by Miller et al. (1991).

Most alcoholic beverages are labeled as to their alcohol content. A significant U.S. exception is beer, which can range from under 2 percent to over 11 percent alcohol. The average content of normal U.S. lager beers has remained fairly constant over the years at just under 5 percent (Leake and Silverman 1971). Even most "light" beers are between 4 and 5 percent alcohol, except for those explicitly labeled "LA" (low alcohol), which average between 2 and 3 percent. Malt liquors average around 6 percent, and "ice beers" and imported beers tend to be over 5 percent as well.

**Bracketing**

The Form 90 interview specifies actual numbers of standard drinks for each day, rather than using ranges or categories (e.g., light days, heavy days). It is necessary to arrive at the most reasonable estimate of number of drinks on each drinking day.

A behavioral assessment procedure known as "bracketing" is often quite useful in conducting the interview. This can be employed, for example, when a client is having difficulty providing a precise number of drinks or hours for a specific occasion. The basic approach is to ascertain a range within which the actual value falls, starting with values that are too high and too low.

"Did you have more than two beers? Was it more than 50? What is the least you would have had? And what is the most you would have had?"

These outer bounds are then tightened until a narrow range is obtained. When the range cannot be constricted further, the midpoint of the range is used as the estimated value.

When a smaller range is offered by the client (e.g., "I had 3 or 4 beers"), use a "closer to" question to decide on the actual value to be entered ("Was it closer to 3 or closer to 4?").

Table 1 may be helpful in recording event frequency during a 90-day period. Be aware, however, that the assessment window for Form 90 is rarely exactly 90 days, so that these should be used only as examples of how to convert verbal descriptions of occurrence into actual frequencies for an assessment window.

For longer periods, convert client reports into actual number of days within the followup window. For a "once a week" occurrence, divide the number of days in the period by 7. Thus, for a 112-day followup window, a self-report of "once a week" throughout the whole period would equal 16 days.

**TABLE 1.—Conversion of verbal descriptions to 90-day scale  
(number of occurrences / 90 days)**

Once a month	3
Twice a month	6
Three days a month	9
Four days a month	12
Once a week	13
Twice a week	26
Three days a week	39
Four days a week	51
Five days a week	64
Six days a week	77
Every day	90

## Conducting the Interview

The biggest clinical interviewing challenge is filling in drinking information for each of the days in the calendar form. The recommended progression for accomplishing this follows six general steps.

**Step 1  
Introduce  
Form 90**

The interviewer should explain to clients that the interview involves mainly reconstructing their drinking history during a specified timeframe and that their assistance is needed in completing this task. How a calendar will be used to recover drinking patterns (defined as quantity and frequency) by linking memory aids to drinking behavior should also be explained.

**Step 2  
Identify  
Memory Aids**

To facilitate clients' recall about their drinking, it is important to gather other information before turning to the drinking questions on the Form 90. Notations about what was occurring in the clients' lives are entered on the calendar to invoke the clients' retrospective recall of daily consumption of alcohol beverages. In order to establish these memorable anchor points, it is important to give clients a variety of probes, ideas, or suggestions and then allow them enough time to search their memory. The regularities in the client's life (e.g., work schedule, payday) can and should be used to provide a context for filling in the calendar with memory aids.

Anchor points common to most clients would include holidays, birthdays, major news or sporting events, paydays, and weekends. Negative events that may have occurred in the client's life are as important as the positive or festive occasions. More idiosyncratic events would include dates of hospitalizations, illness or accidents, arrests or incarcerations, court appearances, beginning or termination of employment, vacations, marital arguments, separations and reconciliations, anniversaries, and birthdays of family members or friends. Reports of such events also make it possible to estimate how much alcohol has been consumed during periods of alcohol availability (e.g., excluding days in jail or treatment).

The interviewer then proceeds by asking several questions about the client's treatment and incarceration experiences during the assessment period. All periods of hospitalization, detoxification, residential treatment, and incarceration are recorded on the calendar. Each day is also accounted for in terms of where the client was living, but this information is usually not recorded on the calendar but on the form itself in total numbers of days in various living situations. Outpatient treatment and 12-step group experiences are also queried but are recorded on the calendar only if they may be helpful memory aids for later reconstruction of drinking. Use of prescription medications is determined as well as status with regard to work, education, and religious attendance.

**Step 3  
Note Abstinent  
Days**

The Form 90 interviewer then proceeds to quantify the client's drinking. At intake (90-AI), spans of abstinence are queried first and recorded on the calendar. Consumption should be asked about even on

days of hospitalization or incarceration because clients may do some drinking on such days.

At followup (90–AF), where the predominant pattern may be abstinence, it may be most efficient to inquire first about periods of drinking and to log these on the calendar before entering abstinent days.

#### **Step 4 Steady Pattern Grids**

Next the interviewer determines whether the client has any predictable patterning for periods of drinking. For those who have a reasonably consistent pattern of drinking over several weeks, a steady pattern grid (items 38–41) may be used to specify that pattern. This pattern can then be used to fill in blocks of the calendar. If the client has only variable episodes of drinking, and no pattern that is reasonably consistent across weeks, the steady pattern grid is omitted.

A second steady pattern grid is available in Form 90 for cases where it is useful to define two different but consistent weekly patterns that occurred during the same assessment window. For example, one steady pattern may characterize the first portion of a followup window, whereas a different steady pattern predominates during the latter portion.

If appropriate, complete one or more steady pattern grids and fill in periods accounted for by these patterns. Note on the calendar those periods when the drinking pattern applied.

#### **Step 5 Episodic Pattern Charts**

Form 90 also has an option (items 42–47) for recording recurrent episodic drinking patterns that are either above or below the usual drinking pattern. Each episode type is quantified as to usual kind(s) of beverage, amounts, and timeframes of consumption. Days of such episodes can then be designated on the calendar. Episodes that occurred only once during the assessment window are entered directly on the calendar.

#### **Step 6 Daily Alcohol Consumption**

Drinking days that cannot be accounted for by either steady or recurrent episodic patterns are reconstructed individually using a modified timeline approach. On completion of this step, there should be drinking data entries in every day of the entire assessment window. Always obtain sufficient information so that SECs and BAC may be calculated.

Throughout the interview, the interviewer should continually focus the client's attention on the calendar and the events depicted on the calendar. It is useful to break the calendar into months or weeks to facilitate recall of patterns and specific episodes. Even for clients with very consistent patterns, the interviewer should probe regarding the special events on the calendar that may have triggered an idiosyncratic episode. The interviewer also should add events to the calendar



that may be revealed after the actual drinking history interview begins.

The interviewer should also pay close attention to inconsistencies in the client's description of drinking and ask questions to resolve these differences and to make sure that accurate information is collected. Interviewers should probe in cases where SECs seem unreasonably high, especially if clients report drinking lethal amounts of alcohol for extended periods of time (e.g., a gallon of spirits a day for a period of a month).

## Missing Followup Periods

Although followup interviews are usually scheduled at regular intervals (e.g., every 90 days), few will occur on exactly the right day. This means that the time between the current and prior followup interviews will be variable. Rather than always using a retrospective 90-day block, the recommended procedure is to attempt to reconstruct the *entire* uncharted period between interviews.

In this approach, there are no "dead" periods in Form 90 followup during which interviewers make no attempt to reach a client who is overdue for a followup. The interviewer should try continuously to complete each followup interview, from the target date until 179 days after the due date for the prior interview. After that day, it should be regarded as a missed followup, and the client enters the next followup period.

When the client is reached, the missing period is then reconstructed (see below). Thus, for example, if the target date for the 9-month followup interview is 9 months after the first treatment session, it may be conducted on any day from there until 179 days after the 6-month due date (though it is highly desirable for the interview to occur as close to 9 months as possible). The regular Form 90 calendar-based procedure is used to reconstruct drinking for the entire span (up to 179 days) back to the date of the prior interview (or, if that interview was not completed, to the target date for the missed interview).

## Reconstruction

If a previous followup has been missed, the interviewer completes a separate Form 90-AF or 90-AT to reconstruct the missed interval. Items 1-5 and 48-58 should be completed for the missed interval whenever possible, again aided by a retrospective calendar. The remote reconstruction of drinking behavior (steady pattern grids, episodic pattern charts, and the calendar) is often a more challenging task. If the pattern is relatively simple (e.g., client abstained throughout the period except for a few days), it may be possible to complete the calendar grid as usual.

When the client has been drinking in a more variable fashion throughout the missed period, however, a day-by-day reconstruction is usually beyond the patience and ability of a client, particularly just after completing Form 90-AF for the current period. In this case, an approximation can be obtained by comparing the missed period with the followup window just reconstructed (Gorenstein 1985). Procedures for this situation are provided by items 59-66 of the Form 90-AF interview protocol. These items are used *only* when a missed interval is being reconstructed, and day-by-day calendar reconstruction is *not* feasible.

In the event that a followup interview is completed close to the due date for the next followup, a period of at least 30 days should pass before the next followup interview is conducted. Thus a single Form 90-AF may be used to assess periods ranging from 30 to 179 days.

## Quick Form

When clients are unwilling either to come for an in-person (90-AF) interview or to cooperate with a full telephone interview (90-AT), the interviewer should always attempt to complete the 1-page quick form, 90-AQ. This provides the minimal essential outcome variables for a followup point. If the client's cooperation and endurance are doubtful, 90-AQ should be completed before proceeding with 90-AT.