

Effective Tools for the Screening and Prescription of Exercise for the Older Adult

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Topics for Presentation

Discuss Risk-Benefit of physical activity

Review current screening guidelines

Development of EASY

The Six EASY Steps

Application of EASY

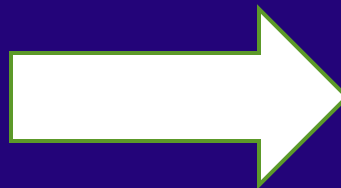
Benefits of PA for Older Adults

Sufficient evidence
supports the physical and
psychosocial benefits of
aerobic, resistive,
stretching/flexibility and
balance exercise
activities for older adults



Benefits of PA for Older Adults

Sedentary lifestyles exacerbate coronary heart disease, degenerative joint disease and osteoporosis, and likelihood of falls and other injuries



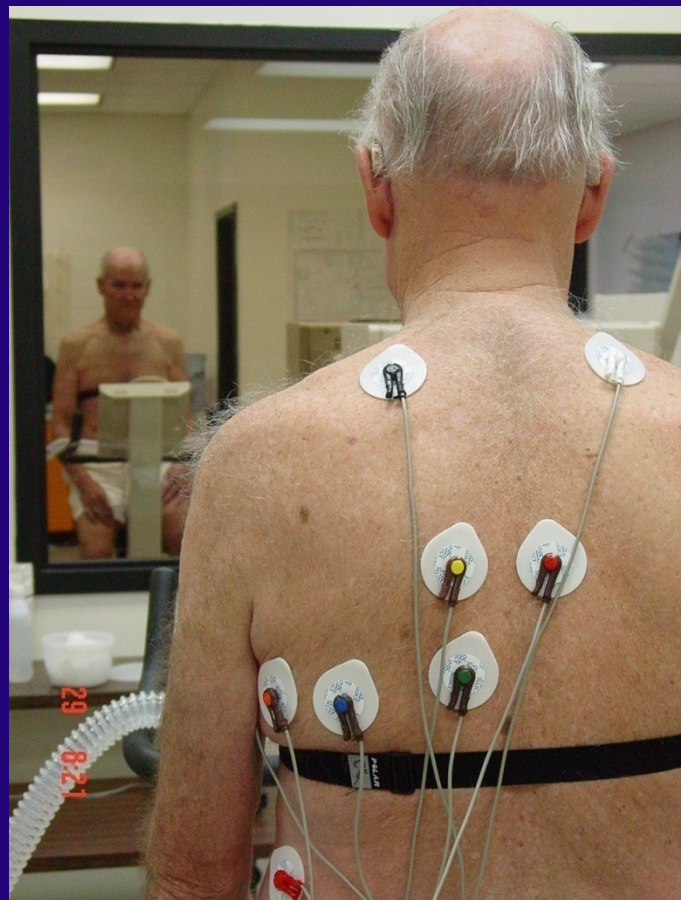
Safety for Older Adults

- Recognize safety of low and moderate intensity physical activity
- Consider the potential risks and benefits associated with physical activity for each older person
- Explore and discuss unfounded fears that being more active may exacerbate underlying disease and cause trauma
- Develop and widely disseminate easy to use safety tips

What is there to fear?

- Most common risks associated with exercise are minor musculoskeletal injuries rather than more serious cardiovascular incidents
- Risk of sudden death or acute cardiac events with vigorous exercise is very low and more likely to occur in those who are sedentary and/or have atherosclerotic cardiovascular disease

Current Screening Recommendations



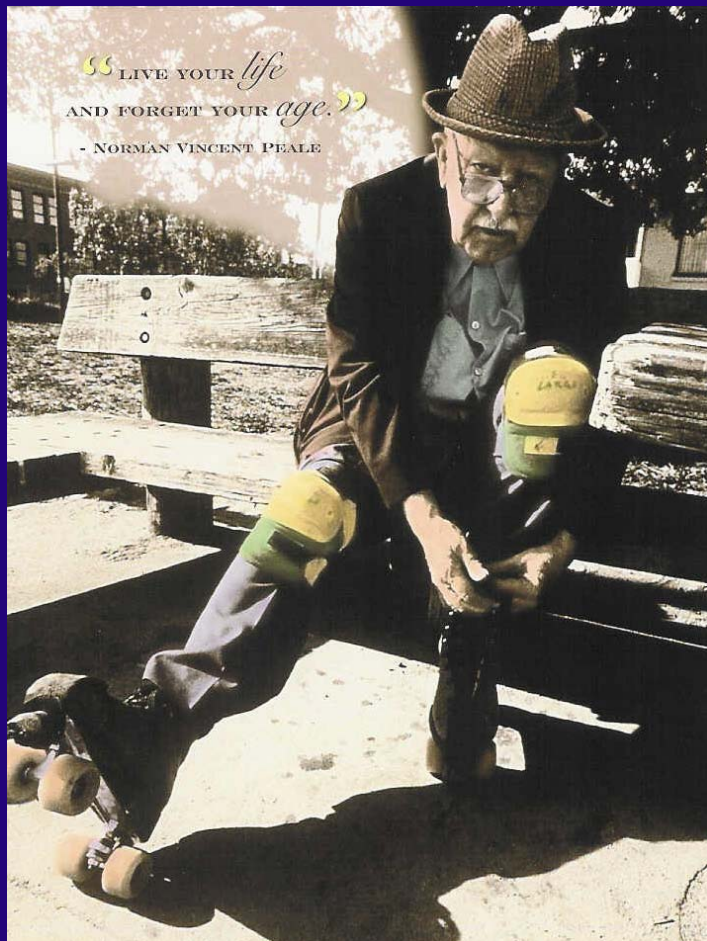
Due to low risk to benefit ratio of exercise, current guidelines from the American Heart Association and the American College of Cardiology no longer recommend routine stress testing for those initiating a low to moderate intensity exercise program

Strategies for Safe Exercise

- Start low and go slow approach
- Safety guidelines for initiation and stopping of exercise program



Unsafe Exercise



Likelihood of sustaining a musculoskeletal injury is greater if:

- an inappropriate exercise program is initiated
- if persons are unaware of signs and symptoms indicating a need to stop or change activity patterns

Pre-Exercise Screening

- *Not* to screen out of exercise
- Minimize risks associated with exercise
- Individually tailor activity programs that are most suitable for older adults' needs and aspirations





Common Screening Strategies

Most commonly used pre-activity screening tools [e.g. the Revised Physical Activity Readiness Questionnaire (Cardinal & Cardinal, 2001), PCP checklist] focus on cardiovascular events with minimal attention paid to more common muscle, joint, or bone-related problems and other risks factors.

Old Habits Die Hard

- Many structured physical activity programs require older adults see their health care provider **before** increasing physical activity at any level
- Recommendation persists despite recognition of the many benefits of exercise for older adults and the relatively low risk of cardiovascular or even musculoskeletal events at a low to moderate level of activity

Screening Persists Despite Findings

- 20% of older adults have a positive stress test and will be exposed to more invasive testing (Kohl et al., 1990; Wennberg et al., 1996)
- Both stress tests and preactivity questionnaires are associated with unacceptably high false positive and false negative results (Morey & Sullivan, 2003)
- There is no prognostic value of testing in asymptomatic individuals with regard to cardiovascular events (Mora et al., 2003)

Benefits and Barriers to Screening

■ Benefits

- Feel safe
- Feel capable
- Know underlying ability

■ Barrier

- Prevents participation for some
- Inconvenient
- Waste of time



The EASY.....

A new conceptualization of screening!

The Exercise/Physical Activity Assessment and Screening for You (EASY)

- Developed to
 - help older adults, their health care providers, or providers of exercise programs or activities, match any physical risks with an appropriate exercise program
 - provide ongoing safety tips to assure safe and effective exercise activities

Initial Development Steps

- The initial work toward the development of the EASY came out of the Behavioral Change Consortium (BCC) Physical Activity Workgroup
 - 11 BCC studies supported by the National Institutes of Health focused on increasing physical activity reported no severe adverse events and relatively few moderate or mild negative events (Ory et al., 2002)

Development of the EASY

Through the support of the Robert Wood Johnson Foundation, a small group of investigators from the BCC Physical Activity Workgroup explored the experiences and beliefs of researchers, clinicians and older adults relative to exercise pre-screening (Resnick, Ory, Coday, Riebe, 2005).

Expert Work Panel

- An expert panel participated in a Screening Roundtable in Washington, DC (May 2005) to:
 - 1) disseminate information about best practices for promoting physical activity in older adults
 - 2) introduce a new screening paradigm of tailoring versus screening by developing an appropriate assessment tool based on the new paradigm
 - 3) recommend actions for identification and monitoring of adverse events in existing community programs.

Panel Conclusions

- Adverse events from light to moderate physical activity programs were minimal across various populations and settings, and effective mechanisms for encouraging increased activity in adults 50 and older were needed
- Plan initiated to develop an easy to use tool that would enable a **quick assessment** of health problems, provide initial strategies for **appropriate tailoring** of physical activity to meet the needs of persons with different health conditions and problems, and **offer safety tips** to further minimize potential health risks



EASY Development Team

Co-Chairs

- Marcia G. Ory, PhD, MPH: Texas A&M Health Science Center
- Barbara Resnick, PhD, CRNP, FAAN, FAANP: University of Maryland

Contributors:

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- Wojtek Chodzko-Zajko, PhD, FACSM: University of Illinois
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- Michael E. Rogers, PhD, CSCS, FACSM: Wichita State University
- Cody Sipe, PhD, ES, RCEP: University of North Carolina at Charlotte

Project Coordinators:

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- Angie Wade, MPH : Texas A&M Health Science Center



Journal of Aging and Physical Activity

IN THIS ISSUE

Neighborhood & individual factors in older adults' physical activity

Comparison of two pedometers and the *activePAL*

A new tool: Exercise Assessment and Screening for You

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A Proposal for a New Screening Paradigm and Tool Called Exercise Assessment and Screening for You (EASY)

Barbara Resnick, Marcia G. Ory, Kerrie Hora,
Michael E. Rogers, Phillip Page, Jane N. Bolin,
Roseann M. Lyle, Cody Sipe, Wojtek Chodzko-Zajko,
and Terry L. Bazzarre

The Exercise Assessment and Screening for You (EASY) is a tool developed to help older individuals, their health care providers, and exercise professionals identify different types of exercise and physical activity regimens that can be tailored to meet the existing health conditions, illnesses, or disabilities of older adults. The EASY tool includes 6 screening questions that were developed based on an expert roundtable and follow-up panel activities. The philosophy behind the EASY is that screening should be a dynamic process in which participants learn to appreciate the importance of engaging in regular exercise, attending to health changes, recognizing a full range of signs and symptoms that might indicate potentially harmful events, and becoming familiar with simple safety tips for initiating and progressively increasing physical activity patterns. Representing a paradigm shift from traditional screening approaches that focus on potential risks of exercising, this tool emphasizes the benefits of exercise and physical activity for all individuals.

Keywords: aging, physical activity, older adults

There is now substantial evidence documenting the many health benefits associated with physical activity for adults of all ages (Katzmarzyk, Janssen, & Arden, 2003; Netz, Wu, Becker, & Tenenbaum, 2005; Palombaro, 2005; Prohaska et al., 2006; Tardon et al., 2005; Wendel-Vos et al., 2004). Physical activity improves health even for chronically ill or frail older adults for whom it is often falsely believed that physical activity will exacerbate rather than ameliorate underlying health problems (Hurley & Scott, 1998; Mallery et al., 2003; Roddy, Zhang, & Doherty, 2005; Singh et al., 2005; Thompson et al., 2003).

The Underlying Message

Exercise is good for persons at all ages. Nearly all older adults can safely participate in moderate intensity physical activities such as a brisk walk or gardening for at least 30 minutes a day, most days of the week. There is a new tool that helps individuals know when to see a health care provider and how to choose activities for optimal benefit given particular health conditions or situations. This changes the role of health care provider from “gatekeeper” to partner in developing appropriate activity programs.

- Includes six screening questions that were developed based on prior experience and clinical research.

www.easyforyou.info



Nearly all older adults can safely participate in moderate physical activity such as a brisk walk or gardening for at least 30 minutes a day, most days of the week. There's now an EASY way to find the best activity for you. The EASY tool helps you know when to see a health care provider and how to choose activities for optimal benefit given particular health conditions or situations.



New Downloads

[Safety Tips](#)

[Screening Tool](#)

[Easy Flyer](#)

You will need the [Adobe Acrobat Reader](#) to view the downloads.

Answer these 6 questions to find an exercise program safe for you.

- 1.** Do you have pains, tightness or pressure in your chest during physical activity (walking, climbing stairs, household chores, similar activities)?

YES

NO



Click on the "Yes" or "No" button to proceed to the next question.

The purpose of this question is to help older adults identify acute cardiac problems that might result if aerobic exercise is initiated

- Encourages the older adult and provider to focus on symptoms, particularly new symptoms
- If the symptoms are not new and they have been previously evaluated, then the individual can link via the internet or other informational tools to appropriate exercise options for a variety of cardiovascular problems
- Can set specific goals relevant to underlying cardiac disease and initiate an exercise program that will be geared toward achieving those goals



Use of the EASY

Each of the EASY screening questions is followed by an algorithm that guides the individual completing the measure through a variety of options.



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1. a.

Is this a new problem?

YES

NO



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1.b.

Has it been checked?

YES

NO



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Process of the EASY

- Differentiates whether or not the cardiac symptoms experienced are new or if they had previously been evaluated
 - If experiencing a new symptom, the individual is encouraged to check with his or her primary health care provider to determine if there is any reason he or she cannot be physical activity
 - If it is not a new problem and the problem has been evaluated previously, then he or she can begin exercising with linked information guiding activities



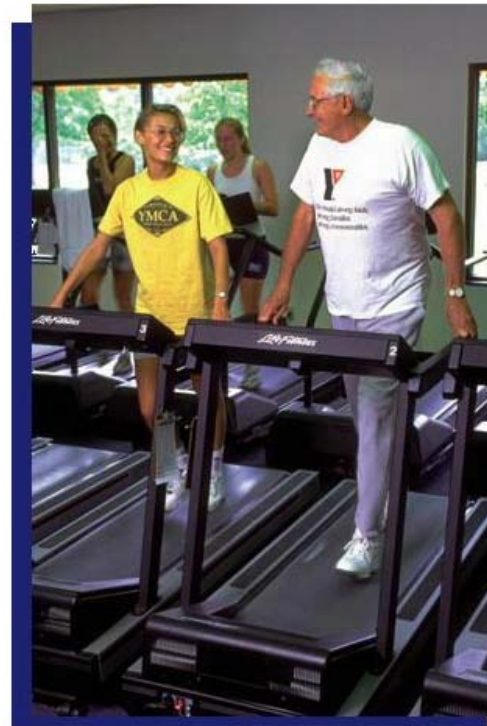
To find the best exercise option for YOU, take our 6 question screening assessment for physical activity:

2.

Do you currently experience dizziness or lightheadedness?

[YES](#)

[NO](#)



- Helps the individual and his/her provider address dizziness, which may be from a variety of underlying medical problems
 - vertigo, underlying cardiovascular problems (e.g. atrial fibrillation or orthostatic hypotension), metabolic problems such as high or low blood sugar, visual impairment, or poor medication management

- If the symptoms of dizziness are new he/she should be evaluated by a health care provider
- If dizziness is a chronic problem, the individual can link to the safety tips for exercise and appropriate exercise programs for individuals who have dizziness





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3.

Have you ever been told you have high blood pressure?

YES

NO



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This question is asked to emphasize the importance of regular blood pressure monitoring among older adults and not to serve as a deterrent to exercise.





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4.

Do you have pain, stiffness or swelling that limits or prevents you from doing what you want or need to do?

YES

NO



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- To help older adults and health care providers identify acute exacerbations of underlying musculoskeletal problems
- To consider chronic musculoskeletal problems so that exercise will not exacerbate these problems



Despite Popular Opinion

Physical therapy and exercise clearly benefit older adults with arthritis



Kovar Et al., 1992; O'Reilly& Doherty, 1999; O'Reilly et al., 2001; Thomas et al., 2002; Roddy et al., 2005.

Musculoskeletal issues..the importance of doing it

right!

- Strategies included in the EASY:

- low-intensity physical activity and increasing the intensity gradually
- increasing muscle strength around weight-bearing joints
- active stretching during the warm-up and cool-down portions of aerobic exercise programs



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5.

Do you fall, feel unsteady, or use assistive device while standing or walking?

YES

NO



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- Focuses on possible balance concerns to optimize safety during physical activities
- Use of canes and walkers should be encouraged as there is some evidence to suggest that these devices improve balance and mobility in many situations

Bateni & Maki, 2005; Steultjens et al., 2004



Overcoming Fear

The EASY will link older individuals who have a history of falls, feel unsteady when walking, or use an assistive device to appropriate exercise interventions and to a comprehensive list of safety tips for exercise.





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6.

Is there a health reason not mentioned why you would be concerned about starting an exercise program?

YES

NO



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- Encourages individuals to report additional symptoms that might influence their ability and willingness to exercise (e.g. incontinence)
- Question links to a variety of exercise programs that incorporate stretching and balance with aerobic and resistance activities and remind the user to follow the comprehensive safety tips prior to, during and after exercise



Thank you:

That was the last question of the Assessment .

Great! You are on your way to developing a healthy exercise program for you. Use the recommendations below as you proceed with your program.

Use recommendations below if you have answered yes to any of the questions for exercising safely with your condition



Print this page.

Share the results with your healthcare provider and ask "Are there any exercises that I should not do"?

1) Do you have pains, tightness or pressure in your chest during physical activity (walking, climbing stairs, household chores, similar activities)? **No**.

2) Do you currently experience dizziness or lightheadedness? **You answered No**

3) Have you ever been told you have high blood pressure? **You answered No**

(If your blood pressure has not been checked in the last 6 months, it is recommended to get it checked with a healthcare provider.)





Improving the Health of Adults Over 50, Through Physical Activity



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The increase in the aging population has led to a public health issue of inactivity. In response, the [National Blueprint Increasing Physical Activity Among Adults Age 50 and Older](#) was developed by a coalition of national organizations.

As a result of the Blueprint, the Active Aging Toolkit was developed by researchers, healthcare providers, professional organizations, and private industry to help healthcare providers prescribe physical activity programs for their patients. ([Download Executive Summary PDF here.](#))

The First Step to Active Health® provides an evidence-based, progressive activity program. The goal of the program is to improve health and functional ability, to promote independence, and to help prevent chronic disease and disability in adults over age 50. The program includes a step-by-step approach to improve your physical abilities with a variety of simple activities, including cardio/aerobic, flexibility, strength, and balance activities. The First Step is an example of a "[Best Practice](#)" for older adult physical activity programs as described by the American College of Sports Medicine.

This website provides information for both patients and healthcare providers to get started.

If you are a patient, [learn how](#) to begin your own First Step program.

If you are a healthcare provider, [learn how](#) to prescribe physical activity programs for your patients. Or, view the [Provider Manual](#) (225KB PDF).



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SAFETY TIPS

Follow these EASY safety tips for when to start and stop exercise. Use the recommendations below for exercising safely with your condition.

Exercise Safety Tips to Always Consider Prior to Starting Exercise

- Always wear comfortable, loose-fitting clothing and appropriate shoes for your activity.
- Warm up: Perform a low to moderate intensity warm-up for 5-10 minutes.
- Drink water before, during and after your exercise session.
- When exercising outdoors, evaluate your surroundings for safety: traffic, pavement, weather, and strangers.
- Wear clothes made of fabrics that absorb sweat and remove it from your skin.
- Never wear rubber or plastic suits. These could hold the sweat on your skin and make your body overheat.
- Wear sunscreen when you exercise outdoors.

Exercise Safety Tips for When to STOP Exercising

Stop exercising right away if you:

- Have pain or pressure in your chest, neck, shoulder, or arm.
- Feel dizzy or sick.
- Break out in a cold sweat.
- Have muscle cramps.
- Feel acute (not just achy) pain in your joints, feet, ankles, or legs.
- Slow down if you have trouble breathing. You should be able to talk while exercising without gasping for breath.

Exercise Safety Tips to Recognize Days/Times When Exercise Should NOT be Initiated:

- Avoid hard exercise for 2 hours after a big meal. (A leisurely walk around the block would be fine).
- Do not exercise when you have a fever and/or viral infection accompanied by muscle aches.
- Do not exercise if your systolic blood pressure is greater than 200 and your diastolic is greater than 100.
- Do not exercise if your resting heart rate is greater than 120.
- Do not exercise if you have a joint that you are using to exercise (such as a knee or an ankle) that is red and warm and painful.
- If you have osteoporosis, always avoid stretches that flex your spine or cause you to bend at the waist, and avoid making jerky, rapid movements.
- Stop exercising if you experience severe pain or swelling in a joint. Discomfort that persists should always be evaluated.
- Do not exercise if you have a new symptom that has not been evaluated by your health care provider such as pain in your chest, abdomen or a joint, swelling in an arm, leg or joint, difficulty catching your breath at rest, or a fluttering feeling in your chest.

Thank you:

That was the last question of the Assessment .

You should **NOT** start exercising yet.

See your healthcare provider first.

Ask "Are there any exercises that I can not do"?

Work with your healthcare provider to identify physical activity/exercise that is appropriate for you.



Print this page and share with your health provider.

1) Do you have pains, tightness or pressure in your chest during physical activity (walking, climbing stairs, household chores, similar activities)? **You answered Yes.**

You also said this was a new problem.

Make sure your healthcare provider knows about the tightness or pressure in your chest during physical activity.

2) Do you currently experience dizziness or lightheadedness? **You answered No**

3) Have you ever been told you have high blood pressure? **You answered Yes.**

View these [links and tips](#).

You also said you are **NOT** taking medication to manage your blood pressure.

(If your blood pressure has not been checked in the last 6 months, it is recommended to get it checked with a healthcare provider.)



Safety Tips / Links for:

Exercises for Joint problems

American College of Rheumatology	www.rheumatology.org/public/factsheets/exercise_new.asp
American Physical Therapy Association-Exercising with Osteoarthritis	headto toe.apta.org/kbase/as/tr4782/actionset.htm
Arthritis Foundation: The 12 Week Walking Plan	www.arthritis.org/media/12%20week%20walking%20plan%20pdf.pdf
Arthritis Organization	www.arthritis.org/conditions/exercise
Centers for Disease Control	www.cdc.gov/nccdphp/dnpa/physical/growing_stronger/exercises/warmup.htm
Human Kinetics	www.humankinetics.com/products/showproduct.cfm?isbn=0736045139
National Arthritis Foundation	www.arthritis.org.sg/101/treat/exercise.html
National Guideline Clearing House: Exercise Program For Osteoarthritis	www.guideline.gov/summary/summary.aspx?
National Institute of Arthritis and Musculoskeletal and Skin Disorders	www.niams.nih.gov/hi/topics/arthritis/arthexfs.htm



The EASY

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Links and Resources:

View Links for:

[Background Information](#)

Executive Summary	Executive Summary (PDF)
Robert Wood Johnson Final Report	www.rwjf.org/
Medscape Whitehouse Conference on Aging Report	Medscape Whitehouse Conference (PDF)
Geriatrics & Aging: Beyond Screening Article	www.agingblueprint.org/
Screening Bibliography 2005	Final Bibliography (PDF)
Project Bibliography 2008	Project Bibliography 2008 (PDF)

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[General Exercise Options](#)

[Physical Activities for Nonambulatory Older Adults](#)

[Cardiovascular Specific Exercise Programs/Information](#)

[Exercises for Dizziness or Lightheadedness](#)

[Exercises for Joint problems](#)

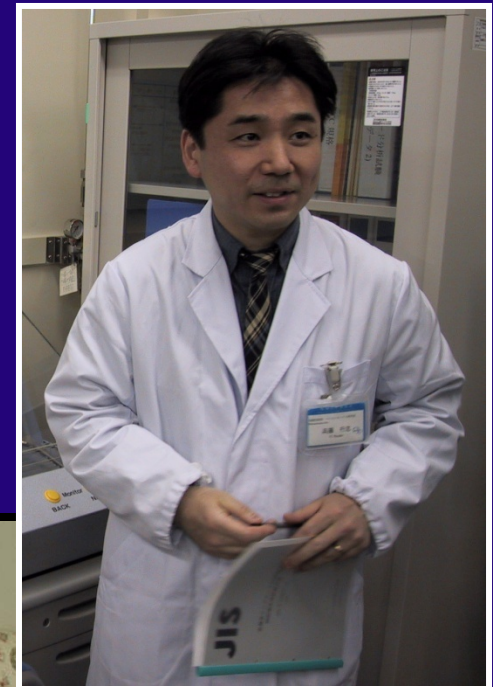
[Exercises with assistive devices](#)

[Overall good exercises](#)



Who can use the EASY

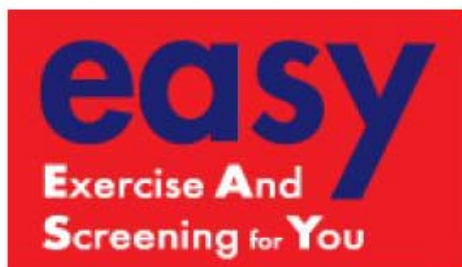
The questions within the EASY can be completed by older adults independently or with their primary health care provider, an exercise trainer or group exercise leader.





The EASY: Print Version

www.easyforyou.info



Nearly all older adults can safely meet the national recommendations of engaging in moderate intensity physical activity (such as brisk walking or gardening) for at least 30 minutes a day, most days of the week. The EASY tool helps you know when to see a health care provider to discuss your exercise plan and how to choose activities for optimal benefit if you have any health problems.

Getting Started

It is always a good idea to start at a level that is easy for you and to build up slowly. See the attached safety tips.

While it is generally not necessary to see a health care provider before beginning every-day physical activities that are of light or moderate intensity, we encourage you to talk with your health care provider about your health and exercise as part of your regular visits.

The EASY tool at www.easyforyou.info helps identify ways you can be active safely.

**For more information
on using the EASY tool please contact:
Phone: 979-458-3507
Email: ahpp@srph.tamhsc.edu**

www.easyforyou.info

Revised 4/3/2008



The EASY: Print Version

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Answering Yes to any of the EASY Questions:

Question	YES
1. Do you have pain, tightness or pressure in your chest during physical activity (walking, climbing stairs, household chores, similar activities)?	<p>If you answered yes to this question and this is a NEW problem, see your health care provider first before starting any exercises.</p> <p>Ask your health care provider “Are there any exercises that I can not do”? Work with your doctor to identify activities that are appropriate for you.</p> <p>If it is not new, or has already been evaluated, begin or continue your exercise program.</p> <p>American Heart Association 1-800-242-8721 http://www.americanheart.org</p>
2. Do you currently experience dizziness or lightheadedness?	<p>If you answered yes, it is recommended that you talk with your health care provider before initiating a new activity program.</p> <p>Ask if there are any exercises you cannot do. Work with your provider to identify exercises good for you.</p> <p>NIH SeniorHealth 1-800-222-2225 http://seniorhealth.gov/exercise/toc.html</p>

www.easyforyou.info

Revised 4/3/2008



State-Wide Falls Prevention Coalition

- During initial assessment EASY questions are part of intake questionnaire
- Lay leader has standardized script confirming importance of physical activity and awareness of risk-benefits
- Safety tips are emphasized
- Older adult encouraged to read more about EASY
- No medical clearance required
- No major adverse events in first year

<http://srph.tamhsc.edu/research/texashealthylifestyles/texas-falls-prevention-coalition.html>

Application in Oldest Old Population

- 163 oldest old
- Most responded yes to 2 items
- Scoring positively didn't inhibit physical activity
- Minimal adverse events



Resnick et al, AJLM in press



***Agreement for Researchers using the
Exercise And Screening for You***

The EASY Partners request that researchers register their use of Exercise And Screening for You materials by providing the information below:

PRINCIPAL INVESTIGATOR:
EMAIL:
PHONE:

ORGANIZATION:

TITLE OF PROJECT:

FUNDING AGENCY:

PROJECT DATES:

PURPOSE OF PROJECT:

PLEASE DESCRIBE HOW THE EASY MATERIALS WILL BE USED IN THE RESEARCH PROJECT:

I have read and agree to abide by all terms and conditions specified in the Agreement for Researchers using the Exercise And Screening for You materials.

Signature _____ Date _____

Goals of the EASY

- Encourage older individuals to talk with their health care provider about their physical activity program.
- Avoid having the health care provider serve as the gatekeeper for initiating physical activity
- Compatible with other initiatives.





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NATIONAL BLUEPRINT:



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It is important for adults of all ages to attain a goal of performing 30 minutes of moderate intensity activity on most days of the week for their health and function in daily life. Unfortunately, most adults do not meet the level of physical activity recommended for maintaining health and function, and older adults are among the most sedentary Americans.

An expert panel of interdisciplinary researchers and clinicians with experience in establishing physical activity programs for older adults has developed the EASY (Exercise And Screening for You).

This tool provides older adults and professionals with recommendations for safe and appropriate activities in light of known risk factors. It offers a comprehensive approach in matching individuals to an appropriate exercise program, identifying potential risk factors associated with exercise, providing safety tips and encouraging communication with medical providers.

While it is generally not necessary to see a health care provider before beginning every-day physical activities that are of light or moderate intensity, we encourage you to talk with your health care provider about your health and exercise as part of your regular visits.



Visit the EASY Web Site (www.easyforyou.info)
For Further Information Contact:
Texas A&M Health Science Center
School of Rural Public Health
Program on Healthy Aging
Phone: (979) 458-3507
Email: ahpp@srph.tamhsc.edu



Components of the EASY Tool:

- 6 question assessment for risk factors
- associated with exercise
- Safety tips for beginning exercise, when to stop exercising and when exercise should not be initiated
- Links to resources and exercise programs for the specific needs of individuals
- Summary report of "what to consider and discuss with healthcare providers before starting an exercise program"

Partners

- ♦ Robert Wood Johnson Foundation®
- ♦ First Step to Active Health®
- ♦ National Blueprint

- www.easyforyou.info
- Resnick, B., M.G. Ory, K.Hora, M.E. Rogers, P. Page, J.N. Bolin, R.M. Lyle, C. Sipe, W. Chodzko-Zajko, and T.L. Bazzarre. A proposal for a new screening paradigm and tool called Exercise Assessment and Screening for You (EASY). *Journal of Physical Activity and Aging*, 16, 231-249, 2008