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Identifying and Locating Complete Psychosocial Instruments

By Mark Stover

Abstract

Reference librarians often encounter “instrument seekers,” library users who need to find a complete psychosocial test, scale, or questionnaire to use or adapt for research or clinical use. This article focuses on the resources that can help to answer these types of questions. Reference books, monographs, journal articles, and online databases are among the kinds of resources that are described in this article. Nomenclature concerns and intellectual property issues related to utilizing tests and measures are also addressed.

Keywords: Psychosocial Instruments; Testing

Introduction

Reference librarians in academic, medical and special libraries are often confronted with students, faculty, clinicians and other patrons who need to identify complete psychosocial assessment instruments to be analyzed, adapted or otherwise utilized in the course of research, teaching or clinical practice (within the constraints of copyright law and professional ethics). Test seekers include students and professionals in a variety of fields, such as psychology, social work, nursing, and education. Finding complete instruments is something that is often tied to specific class assignments or thesis research and can be

frustrating for librarians and users alike. These types of questions are difficult because there is no one master source that identifies all such tools, although many bibliographic and full text databases make an effort to partially identify these kinds of instruments.

Several articles have appeared in the library literature during the past two decades describing how librarians can assist users with psychosocial tests and instruments (Piotrowski and Perdue 1999; Quinn 1997; Jordan 1995; Reed 1994; Voge 1994; Nolan and Whitmore 1992). Most of these articles provide helpful guidance, covering general reference books on psychological testing, sources for reviewing and critiquing tests, search strategies, and online sources for finding test information. While some of the material in these articles is still accurate and relevant, much of it has become outdated, especially regarding the issue of searching for complete instruments.

The most recent of the articles listed above, Piotrowski and Perdue (1999), includes a wide spectrum of topics related to psychosocial testing information and library resources. The current article will not cover the breadth of topics that Piotrowski and Perdue discussed, but will instead focus in depth on the resources that can help instrument-seeking users find *complete* tests. Test-seekers will learn how to utilize such varied resources as reference books, monographs, journal articles, and online databases in their search for complete tests. Nomenclature concerns and intellectual property issues related to adapting and using these tests and measures will also be addressed.

Varieties of Psychosocial Instruments

In this article I will define psychosocial instruments as tests, inventories, scales, questionnaires, checklists, and other measures that are used for psychological, social, or behavioral assessment by a trained professional. (For one resource that contains examples covering the full spectrum of instruments described in this section, see Rush 2000). A “complete” instrument refers to the “full text” version of an instrument that includes all of its items as well as instructions (whether implicit or explicit) on how to administer and score the test. Other kinds of tools that are often utilized in the social sciences include educational or psychological program evaluation assessment instruments; surveys that gather demographic or sociological data; and health or medical history intake forms that gather individual information and may lead to a diagnosis or may simply be used as background information for a healthcare provider.

In some cases instruments are designed to be used as self-assessment tools. The Internet and popular literature contain a plethora of self-assessment resources (McDermott 2004; Pack 2004), but these kinds of tools are often not validated scientifically and thus may not produce accurate measurements. However, non-scientific self-assessment measures should not be confused with “self-report” instruments that are grounded in research and are administered under the supervision of a trained clinician or researcher. Self-report instruments are simply filled out by members of the tested population, but coding and analysis are performed by professionals. (Examples of scientifically grounded self-report

instruments can be found in Janda 2001. Examples of non-scientific psychological tests can be found at <http://www.helpself.com/>).

Nomenclature varies somewhat from one researcher to another and from one discipline to the next. For example, a “scale” almost always refers to an instrument that measures something by varying degrees, such as a Likert Scale that measures from 1-5. However, some researchers use other terms like “subscale” to refer to smaller, discrete (from the researcher’s point of view) sets of items that would normally simply be referred to as scales. Subscales may or may not be integrated into the “parent” scale. Precision in nomenclature is not always a high priority in instrument development. Indeed, some instruments have rather un-descriptive names (such as “Brief Questionnaire”), and some have no names at all.

Lists of behaviors or symptoms are often called “checklists,” but these are usually not considered true “instruments” due to the fact that these types of diagnostic tools are usually not tested for reliability and validity, and often have no measurable outcome. However, when a checklist is rigorously put through a validation and reliability process, and includes a quantitative outcome that can measure the absence or presence of a particular psychosocial disorder, it may be considered a complete instrument (Aiken 1996). Semi-structured interviews or “interview schedules” are flexible clinical tools which are designed to be used by clinicians or researchers but which normally do not generate quantifiable data. Similarly, open-ended questionnaires can be useful to researchers or counselors in that they help with intuitive or instinctual diagnoses, but they

generally do not produce “scientific” results that can be quantified. Psychosocial “surveys” may or may not produce measurable results, depending on the nature and construction of the survey (Aiken 1997).

Although some authors include the final forms of their instruments as appendices to their books, book chapters, or journal articles, many do not, choosing instead to include sample items from the instrument or to simply exclude all items. Test developers may decide to exclude test items for a variety of reasons. Some may want to discourage non-professionals from using the instrument, while others may have a proprietary concern for the test. Sometimes the test creator is acutely aware that his or her instrument is in the primitive stages of development and wants to perform more extensive research before producing a final set of items.

Most of the instruments referred to in this article are known as “unpublished” tests. Unpublished tests refer to instruments that have not been “published” by a commercial publisher and sold through its catalog or website. However, the term “unpublished” is somewhat misleading, since many non-commercial instruments **are** published as appendices to journal articles, doctoral dissertations, or book chapters. Nevertheless, this continues to be the term of choice for instruments not sold through commercial publishers.

Intellectual Property Concerns

Authors of instruments may or may not wish to have their instruments used in other settings, for various reasons: lack of training for other administrators of the instrument, lack of controlled environment, or the tentative nature of the instrument. In any event, permission should always be requested before utilizing any instrument that is published in the literature.

Researchers often adapt the instruments of others to meet their own research needs. These adaptations may have been done with or without permission from the original creator of the instrument. Some researchers believe that any adaptation needs to be done with permission from the original source (author and/or publisher, depending on who owns the copyright). Others feel that since all test creation is derivative, any items published in the scholarly or professional literature are fair game to borrow or adapt, as long as the original source is cited or identified. (This would exclude, of course, wholesale replication of a source without permission, although even that occurs on occasion).

Instrument seekers should not give up when finding a description of a testing tool in a book or article without a complete test appended. Some researchers may discover that the psychometrics of an instrument are presented in tabular format in such a way that the items of the test can easily be discerned. However, the ethics of re-creating such an instrument for clinical use are questionable, since the author purposefully left out the complete form of the test and clearly wanted to discourage widespread replication. A

better alternative for researchers intent on re-using these instruments is to simply contact the author and request a copy of the instrument along with permission to use it. In many cases test creators will gladly share the complete instrument (including all items and instructions on use) with other researchers or clinicians.

Test Compendia

In the late 1960s several compendia of psychosocial measures were published in book form, and since then dozens of others have been compiled. In this section I will discuss some of the most important and useful of recent compendia within this genre.

Joel Fischer and Kevin J. Corcoran (2007) have compiled multiple editions (the most recent being the fourth edition) of *Measures for Clinical Practice and Research: A Sourcebook*. Comprising two volumes, it is divided up into tests for children, families, couples, and adults. *Measures for Clinical Practice and Research* identifies the authors, purpose, and description of the instrument, as well as scoring instructions and the actual items for each test. It also lists the norms, reliability, and validity, as well as the primary source reference in the literature. *Measures for Clinical Practice and Research* is the gold standard for psychosocial test compendia, and has been well-reviewed by psychologists and clinicians. It goes without saying that these volumes should be in

every library that serves students or researchers of psychology, psychiatry, social work, nursing, or counseling.

John Touliatos, Barry F. Perlmutter, and George W. Holden (2001) have edited the massive three volume *Handbook of Family Measurement Techniques*. Volumes 1 and 2 include scholarly essays on various aspects of family relations such as parenthood, marriage, and family health. These first two volumes also contain abstracts of 976 instruments; the abstracts include the variables measured, the type of instrument, a description of the instrument, sample items, and references to the relevant literature (primarily journal articles that utilize the instrument in question). The third volume of *Handbook of Family Measurement Techniques* contains the complete instrument for 168 of these tests, including all items and scoring instructions. *Handbook of Family Measurement Techniques* has been very well received by professionals and is an excellent resource for those researching and treating families.

Raymond Lam, Erin E. Michalak, and Richard P. Swinson (2005) have published a useful test compendium entitled *Assessment Scales in Depression, Mania and Anxiety*. This slim volume (198 pages) includes information on over 90 instruments related to anxiety, depression, manic disorders, and related dysfunctions. Each short section contains information for the instrument in question, including whether it is a clinician-administered scale or a self-report measure, how long the test will take, and the main purpose of the test. *Assessment Scales in Depression, Mania and Anxiety* also includes commentary (including reliability and validity), scoring instructions, references to the

literature, versions available, contact information, and sample items. Sixty-six of these instruments are provided in complete form.

Martin M. Antony, Susan M. Orsillo, and Lizabeth Roemer (2001) are the editors of the *Practitioner's Guide to Empirically Based Measures of Anxiety*. This volume contains scholarly essays on various topics related to the diagnosis and treatment of anxiety disorders, as well in-depth information on over 90 instruments and brief information on many other anxiety-related tests. The in-depth instrument information includes the original citation, the purpose of the test, a description of the instrument, administration and scoring information, psychometric properties, and contact information. In addition, over 75 complete instruments are reprinted here by permission of the copyright holders. Within the same series, the *Practitioner's Guide to Empirically Based Measures of Depression*, edited by Arthur M. Nezu and others (2000), contains 24 complete depression-focused instruments and is similarly structured.

Another good test compendium is *Rating Scales in Mental Health*, edited by Martha Sajatovic and Luis F. Ramirez (2003). This book, which contains 113 complete psychiatric instruments, also includes an overview of each scale, psychometric properties and general applications of the scale, references, copyright information, administration of the scale, and the time generally taken to complete the scale. In addition, *Rating Scales in Mental Health* includes essays on the history of rating scales, statistical evaluation of scales, and rating scale domains, as well as two clinical vignettes describing scenarios of how these instruments might be used in a clinical environment.

Clive M. Davis and others (1998) have compiled the *Handbook of Sexuality-Related Measures*, which contains information on more than 200 instruments. Each short chapter includes a description of the test, response mode, timing, scoring, reliability and validity, and references. In many cases the complete set of items and instructions for the instrument are also included. In those chapters where this is not the case, sample items and/or distribution/purchase information is presented. This book is exceptional among test compendia in that it draws its instruments from several different disciplines including psychology, medicine, and sociology.

The American Psychiatric Association has published the *Handbook of Psychiatric Measures* (Rush 2000), which includes information about approximately 240 instruments (such as clinical utility, psychometric properties, and practical considerations) as well as the complete version of over 100 tests (available on the accompanying CD-ROM). Also included is a “cautionary statement” which states, in part, that the reader should “be aware that many of the measures herein have specific training requirements to which users must adhere to achieve the stated results” (Rush 2000, xxi).

The volumes discussed in this article are by no means the only test compendia that should be utilized when searching for complete instruments. Many others exist; these include disciplines beyond the health sciences and social sciences, such as political science, religious studies, communication, gerontology, education, nursing and marketing. In addition, there are specialized compendia oriented toward instruments to be used with

specific populations, such as African Americans or Latinos. Along with the variety of test compendia that exist, instrument seekers should also be aware that many monographs and edited books contain some complete tests (often only one or two) that are included as appendices. A growing number of these books are available not only in print format but also as electronic publications, accessible through vendors such as NetLibrary or directly from publishers like Lawrence Erlbaum, John Wiley, and MIT Press.

Test compendia with complete instruments are indexed by two free electronic databases: *Tests and Measures in the Social Sciences*, created and maintained by Helen Hough (2007) at the University of Texas, and the *SDSU Test Finder*, created and maintained by Mark Stover (2007) at San Diego State University. *Tests and Measures in the Social Sciences* contains important information about each indexed instrument, including the title and publisher of the book or source, the instrument title, the test acronym, the date of publication or copyright date, the author, and the page or accession number. It currently indexes 121 sources and about 10,800 measures. *SDSU Test Finder*, which is derived in part from Hough's work, contains less information for each instrument but provides indexing for more sources (currently 628 sources, although many of these only contain a small number of complete instruments).

Complete Instruments Found in the Journal Literature

Journal articles also contain a rich mine of complete psychosocial instruments. While many authors of journal articles create unique assessment tools in the course of their research, a relatively small percentage actually include the complete instrument in the article (or as an appendix to the article). Several electronic tools can be utilized to locate these complete assessment tools, including *Health and Psychosocial Instruments (HaPI)*, *PsycINFO*, *CINAHL*, and the *SDSU Test Finder for Journal Articles*.

Health and Psychosocial Instruments (HaPI) is a well known database used for finding test information in health, psychology, and related fields. It provides validity and reliability information, ordering information for commercially produced tests, and descriptor terms for each record. *HaPI* also allows users to limit their searches to “primary sources,” which permits the user to find complete instruments available in journal articles and other literature from 1985 to the present. *HaPI*'s primary source search function may be confusing to many users, however, since this type of search will also generate a list of journal articles that merely discuss the original development and validation of an instrument without including the complete test.

PsycINFO, published by the American Psychological Association, is generally considered to be the premier bibliographic database in the field of psychology. Virtually every journal article ever written in psychology is indexed and abstracted in *PsycINFO*, along with books, dissertations, and other media. Complete instruments can be found using *PsycINFO* by searching for the word “appended” in the Tests and Measures field. However, this process is not foolproof since many articles include complete instruments

which are not indexed as such in *PsycINFO*. Users may need to supplement the above search with other searches that look for words like “appended” or “appendix” across all fields in combination with keywords searches for “tests,” “questionnaires,” and “scales.”

Cumulative Index to Nursing & Allied Health Literature (CINAHL) is an important database for nursing and the health sciences. Since many nurses and allied health professionals utilize psychosocial instruments in the course of their work or research, the nursing literature includes reference to a wide variety of these kinds of tests. *CINAHL* contains two types of test information: “standalone” tests available through the database, and complete instruments attached to articles that are indexed and abstracted by *CINAHL*. There are over 250 *CINAHL* standalone records designated as “Research Instruments.” These records refer to a specific test and contain scoring information, psychometrics, purpose of the test, and other important data. However, only about 25 of these *CINAHL* records actually include the complete instrument in question.

The *SDSU Test Finder for Journal Articles* (Stover 2007) is a prototype database that indexes complete psychosocial instruments in the journal literature. The compiler of this resource performed deep searches into a variety of databases, including *PsycINFO*, *CINAHL*, *Sociological Abstracts*, *HaPI*, *Communication Abstracts*, *Education Abstracts*, and *ABI/Inform* to find complete psychosocial instruments across several disciplines. The interface and database structure are currently somewhat primitive, but the compiler hopes to continue to develop this tool so that it eventually becomes a more robust resource.

Online Resources for Complete Instruments

Many complete instruments are available online on the Web (McDermott 2004; Pack 2004). Most are free of charge, but some require payment of some kind. Many are validated and reliable tests, but others are simply created from scratch and have no scientific basis. Users and librarians should be aware of this distinction and should make an effort to identify those complete online instruments that are grounded in research and peer review.

Some medical schools and other educational institutions have placed complete psychosocial instruments on the Web for clinician use. For example, the Advanced Center for Intervention and Services Research (ACISR) for Early-Onset Mood and Anxiety Disorders at the University of Pittsburgh School of Medicine has made several complete tests available on their website, including a depression scale, an anxiety scale, and a semi-structured research instrument for diagnoses of various child psychiatric disorders (Western 2006). The Calgary Depression Scale for Schizophrenia was developed at the University of Calgary and is available for “experienced raters” and not intended for self-assessment (Addington 2007). (The website clearly states that the university accepts “no responsibility for the scale if it is not administered under appropriate conditions by a professional.”). There are many other complete instruments available on the websites of educational institutions, such as the University of Miami, the

Free University of Berlin (Germany), Stanford University, Swinburne (Australia) University of Technology, York University (Canada), and New York University School of Medicine. Most of these websites have disclaimers like the one quoted above.

Government websites (non-educational agencies) also have posted free assessment tools on the Internet. The U.S. Department of Veterans Affairs (2007) has several tools on its website, including multiple depression scales such as the Zung Depression Rating Scale and the Hamilton Depression Scale. The World Health Organization (2007) has made its Spirituality, Religiousness and Personal Beliefs (SRPB) Instrument available through the Internet. Many government documents are now published online and some contain complete psychosocial instruments. For example, the NIAA has published an online government monograph entitled *Assessing Alcohol Problems: A Guide For Clinicians and Researchers* (Allen and Wilson 2003), that contains many complete assessment tools. The Centers for Disease Control and Prevention has published *Measuring Intimate Partner Violence Victimization And Perpetration : A Compendium Of Assessment Tools*, as well as *Measuring Violence-Related Attitudes, Beliefs And Behaviors Among Youths: A Compendium Of Assessment Tools* (Thompson et al. 2006). Similarly, the Australian Department of Health and Ageing has published *Review Of Diagnostic Screening Instruments For Alcohol And Other Drug Use And Other Psychiatric Disorders* (Dawe, 2002). Again, disclaimers are often provided for these online instruments.

Non-profit organizations and for-profit companies have also posted instruments online, although some of these have not been developed by the organizations themselves but

taken from the public domain. Some examples of these kinds of online instruments include the Agitated Behavior Scale Rating Form provided by the Ohio Valley Center for Brain Injury and Rehabilitation (2007), the Edinburgh Postnatal Depression Scale (EPDS) posted by WellMother.com (2007), and the Multnomah Community Ability Scale made available by the Sheppard Pratt Health System (2007). In some cases, the organization or company desires to sell its assessment products, but may post a complete instrument online as a “sample” to entice users to purchase it. This is the case with ASEBA (Achenbach System of Empirically Based Assessment), which makes the Child Behavior Checklist for Ages 6-18 (CBCL/6-18) as well as the Adult Behavior Checklist for Ages 18-59 available in complete form with a warning that “unauthorized copying is illegal” (Achenbach 2007).

One cannot write about non-profit organizations which offering complete tests without mentioning the massive website known as the Medical Algorithms Project. This website, created and maintained by the Institute for Algorithmic Medicine (2007), contains thousands of health-related formulas, forms, and spreadsheets that can be used in medical research and teaching (though a disclaimer discouraging actual use in clinical care appears on the website). These algorithms include many complete psychosocial tests and instruments in fields such as psychiatry, pediatrics, neurology, performance measures, and quality of life. Instruments as varied as the Kutner Morale Scale, the Epworth Sleepiness Scale, the Geriatric Depression Scale, and the Behavioral Pain Scale are included in this online compendium. The Medical Algorithms Project is an incredible resource for students, instructors, researchers, and (ultimately) clinicians.

Other Sources

There are several other sources that librarians should be aware of when working with instrument-seeking patrons. One is the Educational Testing Service (ETS), which owns a large number of psychosocial tests in both microfiche and electronic formats (though it should be noted that many ETS tests are strictly educational in nature and not meant for clinical use). “*Tests on Microfiche*” can be searched through the *ETS Test Collection Database* (Educational Testing Service 2007), and then ordered online, by telephone, or through the mail. (It should be noted here that the *ETS Test Collection Database* includes some early versions of instruments that were later validated and published commercially). Electronic “*Tests on Demand*” can be purchased online and downloaded immediately through a secure server, to be used only for research purposes. In the future, ETS will offer an annual online subscription to the *Tests on Demand* electronic collection of instruments, which will allow library users to download multiple copies of these tests and permission to reproduce the complete instruments for research purposes.

One of the best known tools in the field of psychosocial instruments is the 16 volume *Mental Measurements Yearbook (MMY)* (Buros 2005). Several years ago the publishers created an online database equivalent (covering the years 1985 to the present) of the print version of *MMY*, containing over 2,000 contemporary testing instruments. It provides descriptions, critiques, psychometrics, and references, with contact and pricing

information for those who wish to purchase the entire test. *MMY* does not include any complete instruments but it does offer an excellent guide to the universe of commercially published psychological tests. The companion to *MMY* is *Tests in Print*, available in both print and online format. *Tests in Print* is a comprehensive list of all commercially available tests (in English) that are currently in print. *Tests in Print* includes the purpose of each test, the publisher, price, intended test population, administration times, date of publication, and test author. The online version of *Tests in Print* has direct links to each instrument reviewed in *MMY*.

Similar to *MMY* is *Test Critiques* (Keyser and Sweetland 2005), produced by test publisher PRO-ED and currently comprised of 11 volumes. *Test Critiques* includes extensive descriptions and critiques of the most commonly used commercially available instruments in psychology, business, and education. It also contains information on psychometrics, practical applications, and references to the literature. Like *MMY*, it only reviews commercial tests, and it gives contact information (in the form of an index of test publishers) but not pricing. PRO-ED would serve the research and clinical community well by creating an electronic database of the instrument reviews found within *Test Critiques*.

Those who decide to purchase tests reviewed in *MMY* or *Test Critiques* should know that some commercially produced instruments are considered “secure” and have certain legal restrictions placed on them. For example, some tests may only be administered by licensed psychologists or by a trained professional with equivalent clinical certification.

The *Directory of Unpublished Experimental Mental Measures*, published by the American Psychological Association in eight volumes (Goldman 2003), is an index to psychosocial tests published in the journal literature. While helpful in terms of descriptive psychometrics and broad subject categorization, this resource does not differentiate between complete instruments and incomplete instruments. There is no way to tell from the entries in this resource if the complete test is appended to the article or not. While this is not a fatal flaw, it is something that APA might look at for future editions of this resource. In addition, APA might also consider putting this information in online format as they have successfully done with other products and publications.

Finally, I should mention that some academic libraries have compiled (often with assistance from teaching faculty, researchers, and clinicians) specialized “test collections” that include complete test kits and instruments produced by commercial publishers (Fehrmann and O’Brien 2001). Test collections are invaluable for students and instructors seeking to utilize these resources in a controlled environment (for research and teaching purposes), as well as for clinical faculty members and campus licensed counselors and therapists who need access to these tests for clinical objectives. Library users should be aware that these collections often have strict access parameters. As mentioned earlier, some tests may only be administered by licensed clinicians, and even examining some commercial instruments may require written authorization from a clinical faculty member.

Conclusion

There is no one tool that can be used to find all complete psychosocial instruments that exist. However, librarians and users of library resources have recourse to several different electronic sources that can aid in the instrument-seeking endeavor. Complete instruments in monographs, reference books, journals, online databases, websites, and microfiche can be discovered when the right tools are utilized. Future improvements in these tools will make this task even easier and more productive.

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