

#3.1 SELECT METHOD TO IDENTIFY CANDIDATE INSTRUMENT

WORKING GROUP:

OMERACT requires each working group to identify one or more candidate instruments before entering Part A of the Instrument Selection Pathway. Chapter 5A explains that this identification can occur through several approaches and takes place before any formal assessment of domain match and feasibility. The purpose at this point is to select an instrument(s) that appear to fit the core domain and intended context of use, and not to decide on a single final instrument for endorsement. Working group may choose to advance multiple instruments for a core domain if that supports their aims.

Considerations When Selecting a Candidate Instrument

Before formally entering Part A, working groups should briefly assess whether the candidate instrument appears promising.

1. ALIGNMENT WITH THE CORE DOMAIN SET

Confirm that the instrument's items, instructions, recall period, response options, and scoring appear consistent with the definition of the core domain the working group intends to measure. This check is about ensuring a reasonable early fit between the instrument and the Core Domain Set.

2. FEASIBILITY IN THE INTENDED CONTEXT

Avoid selecting an instrument where a known barrier will prevent future use in trials (e.g., unavailable translations, unfeasible administration requirements). Consider:

- licensing or copyright
- cost
- mode of administration
- electronic vs paper use
- translations and cultural adaptation
- scoring complexity
- availability of norms or reference values

3. PRELIMINARY EVIDENCE OF MEASUREMENT PROPERTIES

There should be at least some evidence suggesting the instrument might discriminate in clinical trials or show acceptable validity. (Formal evidence appraisal occurs in Part B.)

4. IDENTIFICATION DOES NOT EQUAL ENDORSEMENT

Both Part A and Part B must be completed for an instrument to receive OMERACT endorsement. Selecting a candidate instrument for Part A is not an endorsement. The process is designed to be iterative, and working groups may return to add or replace instruments at any point.

5. A CORE DOMAIN MAY BE MEASURED USING MORE THAN ONE APPROACH

Consistent with OMERACT guidance, a single core domain may be assessed using more than one instrument, or through more than one score derived from a single instrument, depending on the context of use and the available evidence. This is particularly relevant for complex domains where no single score may fully represent the domain across all settings. (see OMERACT discussions of composite and multi-outcome domains).

Example

Core domain: Pain

Depending on the context of use, pain may be assessed using more than one measurement approach. For example, a Working Group may select a numeric rating scale to assess pain intensity at a single time point, while also considering a summary score derived from repeated assessments over time to capture change in pain. Both approaches are intended to measure the same core domain but provide complementary information, and the choice of approach should be justified based on the research question and available evidence.

Tip: Instruments that demonstrate strong domain match, feasibility, and published evidence across several measurement properties are the most likely to reach at least an amber rating and move through the OMERACT Filter.

Please select one of the following options:

1. **Convenience approach:** Working group members suggest instruments based on their knowledge or experience, but they should also consider the possibility of newer or improved instruments being available.
2. **Instrument repositories:** Working Groups can search established instrument databases, such as PROQoLID and the EULAR Outcome Measures Library, to identify existing measures relevant to their domain(s). A comparative review of major repositories and their utility for OMERACT Working Groups is available: <https://omeract.org/wp-content/uploads/2025/01/Instrument-Database-Comparison-Report.pdf>
3. **Scoping review approach:** A scoping review may be used to identify all available instruments that assess one or more domains of interest. Because scoping reviews are resource intensive, they are not considered the default or required approach for identifying candidate instruments and are generally discouraged unless the rationale and feasibility have been discussed in advance with the TAG Chairs.
4. **Other (working group-defined approach):** Working groups may choose to define their own custom approach for identifying candidate instruments, allowing flexibility to incorporate unique strategies tailored to their specific needs, resources, or expertise that may not fit the standard methods. Before proceeding, the proposed approach and its details should be discussed and agreed upon with the TAG Co-Chairs.

Date of Submission: