



Correlation of Western Ontario and McMaster Universities Osteoarthritis (WOMAC) and Short Form 36(SF36) Questionnaires in Patients with Knee Osteoarthritis

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Abstract

Background: The aim of the present study was evaluate the correlation between condition-specific and generic health status questionnaires for measuring health-related quality of life in patients with osteoarthritis (OA) of the knee.

Methods: This cross-sectional survey included a total of 424 patients aged 50 years and over, with symptomatic OA of the knees. All patients completed Correlation of Western Ontario and McMaster Universities Osteoarthritis (WOMAC) and Short Form (SF-36) questionnaires and were assessed for severity of OA. The correlation between radiographic findings, patients' symptoms also between the scores of two questionnaires were evaluated.

Results: A significant correlation was found between WOMAC pain, stiffness and function scores and all SF-36 domains and the strongest correlation were between WOMAC pain dimension and the SF physical function. There was correlation between patients BMI and SF-36, also VAS scores. Patients with knee OA in grade 2 and 3 had lower HRQL (according to both WOMAC and SF 36 measure) compared to patients with knee OA in grade 1.

Conclusion: There are agreements between dimensions of WOMAC and SF36 in measuring HRQL in patients with knee OA. Symptoms also correlate with radiographic findings and BMI. The use of both a generic measure of HRQOL such as the SF-36, and a disease specific such as WOMAC is useful in characterizing the global burden of this disease.

Keywords: Knee osteoarthritis; Questionnaires; Quality of life

Introduction

Osteoarthritis (OA) of the knee is prevalent musculoskeletal problem worldwide [1,2]. Globally 3.6% of the population have osteoarthritis of the knee [3]. This condition impairs functional capacity and decreases quality of life (QOL) in patients by producing pain, stiffness and limitation in range of motion of the joint. Knee OA pose a significant economic burden on the community [4]. The goal of contemporary management of knee is control of pain and improvement in function and health-related quality of life [3,4]. In this context, it is necessary to develop valid outcome measures evaluating the effectiveness of the various treatment modalities in OA [5-7]. Quality of life has multiple dimensions [2]. Several generic and disease-specific questionnaires measure quality of life in patients with chronic conditions [8-10]. Short From-36 (SF-36) is among the generic measures that has been extensively used in different populations and shown to be a valid and reliable measure [8,11]. Disease or condition-specific instruments are useful for measuring clinically important changes in response to treatments [8,9,11]. The most widely used condition-specific instrument for the assessment of OA of the lower extremities which is valid and reliable is the Western Ontario and McMaster Universities (WOMAC) Osteoarthritis Index [11,12]. The literature supports the inclusion of both a generic and a disease-specific health related quality-of-life measure (HRQOL). There are advantages and disadvantages for both generic and disease specific measures [9,11]. The latter are designed to focus on the specific disorder and the patient's related problems related to it. So, disease specific tools may be more relevant to the patient and the physician than generic instruments, and may be better at detecting the effects of treatment other hand, generic measures may, because of their broader perspective, detect complications or side effects in areas of function

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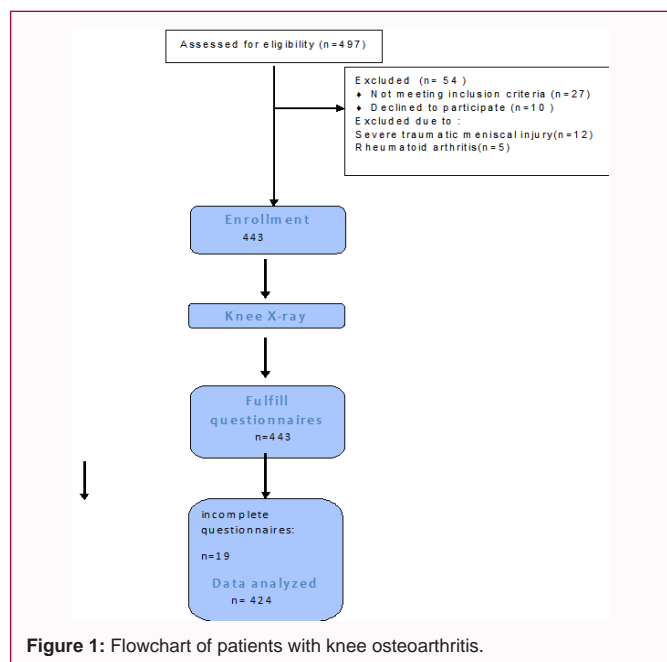
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or organ systems not specifically related to the disease under consideration. (HRQL) [9,11-13]. Furthermore, the severity of the disease should be determined by objective and subjective measures including questionnaires in order to select the appropriate therapy [9,14].

WOMAC and SF-36 are widely used in clinical and research settings. Although the correlation of these two questionnaires were previously investigated [8,11], the association between the severity of osteoarthritis and quality of life has not been evaluated before; also there is disagreement between different studies about the effect of Body Mass Index (BMI) on quality of life in patients with knee OA [2,6,14].

The purpose of the present study was to compare the correlation between the generic HRQOL tool, the SF-36, with a disease-specific HRQOL measure, the WOMAC, in a large population of patients with knee OA, also to determine whether there is association between disease severity determined by radiographic indices and quality of life, also between BMI and quality of life measured by the above questionnaires.

Methods

Recruitment of patients

In this cross-sectional survey, conducted at physical medicine clinic at educational hospital, all patients with knee pain referred to the outpatient clinic during 2014 were evaluated to enter the study.

Study approval was obtained from the Research Ethics Committee of Shahid Beheshti University of Medical Sciences.

Inclusion criteria

Patients were recruited according to ACR criteria for clinical diagnosis of idiopathic knee OA. ACR criteria were based on knee pain in either knee on most days for at least 1 month in the previous year and at least two of the following signs/symptoms: stiffness, crepitus, bony tenderness, and bony enlargement [15].

Exclusion criteria were: 1) inflammatory arthritis; 2) self-reports

of having current knee conditions such as meniscus tears and knee ligament ruptures; 3) those with neurological conditions or medical comorbidity (e.g., terminal conditions such as end-stage renal disease, heart failure or malignancy), drug abuse, or a psychiatric disorder.

Patients with above criteria were recruited in this study and provided informed consent.

Radiography of the affected knee was requested for each patient. Radiographs of the knees were weight-bearing anteroposterior (AP) and lateral film. Knee films were scored by a radiologist, unaware of the clinical status of the subject, according to the Kellgren and Lawrence (K/L) grading system [16].

Demographic and socioeconomic information were assessed via interviewing with each patient.

Persian version of the short form-36 (SF-36) questionnaire of health survey [17] and Western Ontario and McMaster Universities Arthritis Index (WOMAC) questionnaire [18,19] were fulfilled by all patients. These questionnaire have been shown to be valid and reliable instruments to evaluate HRQO in patients with lower limbs osteoarthritis [17-19]. Interview was performed by a resident of physical and rehabilitation medicine.

Measures

Western and Ontario and McMaster Universities Osteoarthritis (WOMAC).

The WOMAC is a multidimensional, self-administered health status instrument for evaluative research in knee OA clinical trials. The WOMAC consists of 24 items divided into 3 subscales. The pain scale includes five items asking about pain at activity or rest. The stiffness scale includes two questions. The function dimension explores the degree of difficulty in daily activities [13,18].

The WOMAC is present in both 5-point Likert-type and 100 mm Visual Analog formats. In this study, the Persian WOMAC was used [18], and all 24 WOMAC items are rated on a likert rating scale. The Likert Scale version uses the following descriptors for all items: none, mild moderate, severe, and extreme.

SF-36

The SF-36 is a multi-purpose, short-form health questionnaire. It takes approximately 7 to 10 minutes to be completed. It yields an 8-scale profile of functional health and well-being scores. These scales include: physical function, role limitations due to physical problems, bodily pain, vitality or energy level, role limitations due to personal or emotional problems, mental health, social function, and general health perception ranging from 0 ("maximal symptoms/maximal limitations/poor health") to 100 ("no symptoms/no limitations/excellent health") [11,13].

The SF-36 is the most widely used general health status instrument and has been translated into many languages. The instrument is for persons aged 14 years and older. Studies show excellent psychometric properties and there seems to be good responsiveness to change in patients with rheumatic conditions, compared with some longer instruments [13].

Statistical analysis

To investigate a possible influence of patient characteristics such as age, sex, BMI, and radiographic OA severity on the WOMAC and SF-36, the associations between the WOMAC and SF-36 subscales

Table 1: Demographic characteristics of the patients with knee OA.

Age(mean±sd)	58±8
Sex(male/female)	59(14%)/362(86%)
Duration of symptoms	11±3(months)
BMI(weight(kg)/height(m) ²	4.2±28(19-40)
20-25	96(22%)
25-30	191(45%)
30-35	100(24%)
>35	37(9%)
Kellgren-lawrence rating score	
Grade I	29(6%)
Grade II	187(44%)
Grade III	146(34%)
Grade IV	62(14%)
Educational level	
Primary school	193(46%)
Secondary school	97(22%)
High school / university	134(32%)

Table 2: VAS, WOMAC and SF-36 scores in patients with knee osteoarthritis.

	Mean Score ±sd	median	Interquartile (25 th -75 th)
VAS	3.5±2.21	5-Feb	3.5
WOMAC subscale			
Pain	7.04±4.43	0-3	7
Stiffness	2.08±1.88		2
Physical function	22.1±13.2		
SF-36 subscales			
Physical function	25-65	45	43.51±26.8
Physical role limitation	0-75	34	30.9±40.4
Bodily pain	43.3-70	55	53.2±26.6
Energy/Vitality	40-75	60	56.9±24.4
Emotional role limitation	0-100	33.3	48.8±42.9
Mental health	44-78	60	60.9±23.6
Social function		70	65.4±28.5
General health	45-80	60	60.6±21.6
PCS-36	0-100	52	47.3±23
MCS36	40-100	61	58.7±23

and these characteristics were quantified by Wilcoxon’s rank sum test and by Kruskal-Wallis one-way analysis of variance. Data were analyzed using Statistical Package for Social Sciences (SPSS) for Windows version 6.0 program. Both questionnaires were scored according to guidelines of their authors [17,18].

Median and interquartile ranges were presented as well as means and standard deviations.

To assess the correlation between WOMAC and the SF-36 measures we used Spearman’s rank correlation coefficient, The Spearman correlation coefficient was interpreted as follows: <0.3: none; 0.31–0.5: weak; 0.51–0.7: strong; 0.71–0.9: very strong; and >0.9: excellent [9].

Results

At the beginning, 497 patients were first evaluated for eligibility to enter the study. At the end 424 patients were included in the study (flow chart, Figure 1). The study population characteristics of age, BMI and the percentage of patients with K/L rating score are listed in Table 1. As it can be read from this table, most of the patients were overweight and obese (69%).

Table 3: Mean scores of WOMAC, SF 36 and VAS in 4 subgroups of patients (stratified according To BMI).

Measure	Score(Mean ±sd)	P value
WOMAC		
BMI (20-25)	29±17.5	0.1
BMI(25-30)	32.±17.4	
BMI(30-35)	29.1.±20.3	
BMI(>35)	37±18.3	
SF36		
BMI (20-25)	59.2±21.6	0.003
BMI(25-30)	51.8±18.9	
BMI(30-35)	52.5±22.7	
BMI(>35)	43.7±18.3	
VAS		
BMI (20-25)	2.9±1.8	0.02
BMI(25-30)	3.7±2	
BMI(30-35)	3.3±2.3	
BMI(>35)	3.9±2.4	

Table 4: The Correlation between WOMAC and SF-36 dimensions.

	WOMAC		
	Pain	Stiffness	Function
SF-36 subscales			
Physical function	-0.647*	-0.476	-0.737
Physical role limitation	-0.576	-0.392	-0.644
Bodily pain	-0.622	-0.471	-0.657
Energy/Vitality	-0.258	-0.257	-0.321
Emotional role limitation	-0.224	-0.181	-0.245
Mental health	-0.173	-0.137	-0.206
Social function	-0.326	-0.306	-0.428
General health	-0.319	0.249	-0.321
PCS-36	-0.731	-0.498	-0.775
MCS-36	-.329	-0.262	-0.379

Table 2 summarizes the mean, standard deviation, median values, and interquartile for each of the aspects of the WOMAC and SF-36.

There was correlation between patients BMI and VAS also between BMI and SF-36 scores. (BMI grading: group 1: BMI: 20-25 kg/m²; group 2: BMI: 26–29 kg/m², group 3: BMI: 30-35 kg/m² and group 4: BMI >35 kg/m²). In patients with higher BMI, quality of life increased according to VAS and WOMAC scores (Table 3).

Younger patients (<50 year old) gained significantly better scores of Emotional role and general health subscales of SF-36 compared to older patients.

A significant correlation was revealed between WOMAC pain, stiffness and function scores and all SF-36 domains (p<0.0001). The strongest correlation was between WOMAC pain dimension and the SF physical function compared with other SF-36 scales (rho=0.647) (Table 4).

The WOMAC function dimension had the strongest Spearman’s correlation coefficient with the SF-36 physical functioning scale (rho=0.737) (Table 4).

The WOMAC stiffness dimension had rho coefficients of 0.476 with the physical functioning scale of the SF-36. The coefficients are negative, as higher scores in WOMAC are correlated with lower SF-36 the scores and improvements in the HRQL (Figure 2).

We also investigated the relationship of WOMAC scores with

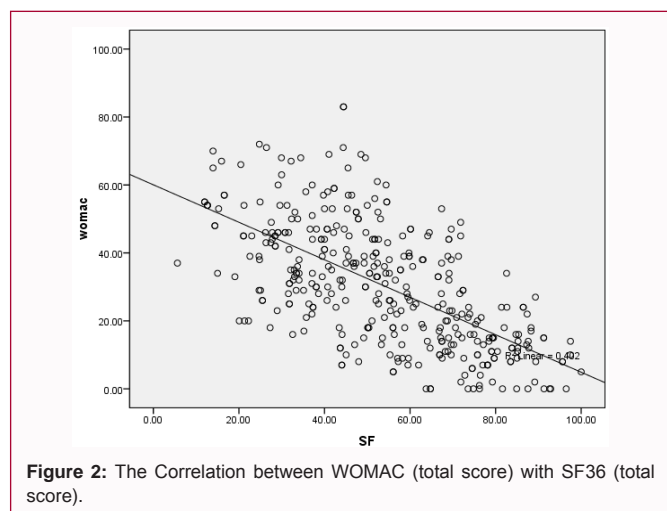


Figure 2: The Correlation between WOMAC (total score) with SF36 (total score).

Table 5: Mean scores of WOMAC, SF 36 and VAS according to OA severity (four grades of Kellgren Lawrence).

Measure	Score(Mean \pm sd)	P value
WOMAC		
Grade I	17.3 \pm 15.6	<0.001
Grade II	28.2 \pm 16.9	
Grade III	31.1 \pm 17.5	
Grade IV	44.4 \pm 18	
SF36		
Grade I	72.9 \pm 22.9	<0.001
Grade II	54 \pm 19.1	
Grade III	50.8 \pm 19.94	
Grade IV	44.7 \pm 19.6	
VAS		
Grade I	2.7 \pm 3	<0.001
Grade II	3.1 \pm 2	
Grade III	3.5 \pm 2.1	
Grade IV	4.9 \pm 1.8	

SF-36 PCS and MCS scale scores. As shown in Table 4, WOMAC dimensions were better correlated with PCS than MCS. The WOMAC function correlated best with PCS ($\rho=0.775$).

Patients with knee OA in grade 2 and 3 had lower HRQL (according to both WOMAC and SF 36 measure) compared to patients with knee OA in grade 1 ($P<0.05$) (Table 5).

Discussion

In this study, significant correlation was found between WOMAC pain, stiffness and function scores and all SF-36 domains, the strongest correlation was between WOMAC pain dimension and the SF physical function compared with other SF-36 scales. Also, impairment of HRQL was associated with increasing radiographic change. The association between HRQL measured by WOMAC and SF36 and radiographic scales was not evaluated in previous studies.

Knee OA are among the most common musculoskeletal problems and the cause of chronic pain in elderly persons and have important public health implications [20]. Older adults with knee OA undergo a significant impact on multiple dimensions of HRQOL, compared with healthy controls [19-21].

There may be discordance between objective findings such as radiographs and patients symptoms including joint pain and impairment in physical function [22]. However, in our study, HRQL decreased as the severity of knee OA increased in radiographic

imaging. This finding is in agreement with the result of other similar trials in OA patients which higher radiographic score were statistically associated with higher pain scores [2]. On the other side, in some studies, 10% of those with normal radiographs complain knee pain, while only 40%–79% of those with advanced radiographic abnormalities report pain and stiffness [7,9]. A number of other studies have been aimed at investigating the impact BMI on knee symptoms. In a study by Panj J, There were no correlations between BMI, duration of disease, KL score and the vast majority of SF-36 subscale scores in patients [20,23]. However, in a study by Pereira D, higher BMI were associated with higher radiographic score, also higher pain scores [24]. These findings are in line with the result of the present study that patients with higher BMI had higher pain, also lower quality of life according to SF 36 scale.

The WOMAC questionnaire is a valid and tested disease specific HRQOL questionnaire to assess symptoms and physical functional disability in patients with OA of the knee [25]. It was demonstrated that most of its dimensions are in good accordance with SF 36 as a generic HRQOL questionnaire [26,27].

In the present study also significant correlation was found between WOMAC scores and all SF-36 domains, the strongest correlation were between WOMAC pain dimension and the SF physical function. The WOMAC function dimension achieved the highest Spearman's correlation coefficient with the SF-36 physical functioning scale. This association between WOMAC and SF 36 dimensions is in agreement with the results of previous studies in this field [9]. The authors assessed the health status impact of hip and knee OA in 244 population aged 50 years and over and compared the metric properties of the WOMAC disease-specific questionnaire (Western Ontario and McMaster Universities) with generic measures [i.e., the Short Form 36 (SF-36) in patients with OA of the lower extremities of patients with OA of the lower extremities [9]. This investigation has confirmed that WOMAC is the instrument of choice for evaluating patients with lower limb OA. For a more general insight into patient's health and in particular cross-sectional studies of the elderly, where comorbidity is common, the SF-36 should also be used [28,29].

A number of studies demonstrate that the condition-specific measure is more sensitive to knee problems than the generic measure [27]. These findings corroborate that these instruments are measuring different aspects of patients' health. A generic measure (SF-36) was not as sensitive to knee impairment as condition specific measures [28,29].

These results highlight the various uses for these measures. The disease-specific instrument detects improvements in the knee postsurgery, whereas the generic measure points out that these elderly subjects continue to have major disabilities. Disease-specific measures are essential to detect improvements due to specific interventions and to confirm the usefulness of the intervention on a patient's pain and function due to the specific disease [30]. Generic measures are important to document patient's overall pain and function due to any condition [29,30].

Conclusion

In the present study, there was an association between OA severity based on radiographic findings and HRQL (according to both WOMAC and SF 36 instruments), also between BMI and pain score, also between BMI and quality of life according to SF 36 scale. There was agreement between dimensions of WOMAC and SF36 in

measuring HRQL in patients with knee OA. Symptoms also correlate with radiographic findings.

The strong point of the present study was large sample size compared to similar studies. A limitation of our study is its cross-sectional nature, also the sample of our study could not be representative of the general knee OA population as female predominance was very high. Future studies should address the comparative sensitivity of generic and disease-specific measures in the same subject over time. This information is important to the design of intervention studies when these instruments are used as outcome measures. A clinically important change in these instruments after surgical or rehabilitation interventions needs to be assigned.

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