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Acquisition of a Simple Motor Skill: Task-Dependent Adaptation and Long-Term Changes in the Human Soleus Stretch Reflex

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1 Abstract

2 Changing the H-reflex through operant conditioning leads to CNS multi-site plasticity and can affect 3 previously learned skills. In order to further understand the mechanisms of this plasticity, we operantly 4 conditioned the initial (M1) component of the soleus stretch reflex. Unlike the H-reflex, the stretch 5 reflex is affected by fusimotor control, comprises several bursts of activity resulting from temporally 6 dispersed afferent inputs, and may activate spinal motoneurons via several different spinal and 7 supraspinal pathways. 8 Neurologically normal participants completed six baseline sessions and 24 operant conditioning sessions 9 in which they were encouraged to increase (M1up) or decrease (M1down) M1 size. Five of eight M1up 10 participants significantly increased M1; the final M1 size of those 5 participants was 143±15% 11 (mean±SE) of the baseline value. All eight M1down participants significantly decreased M1; their final 12 M1 size was $62\pm6\%$ of baseline. Similar to the previous H-reflex conditioning studies, conditioned 13 reflex change consisted of within-session task-dependent adaptation and across-session long-term 14 change. Task-dependent adaptation was evident in conditioning session 1 with M1up and by session 4 15 with M1down. Long-term change was evident by session 10 with M1up and session 16 with M1down. 16 Task-dependent adaptation was greater with M1up than with the previous H-reflex up-conditioning. This 17 may reflect adaptive changes in the muscle spindle sensitivity, which affects the stretch reflex but not the 18 H-reflex. Because the stretch reflex is related to motor function more directly than the H-reflex, M1 19 conditioning may provide a valuable tool for exploring the functional impact of reflex conditioning and 20 its potential therapeutic applications.

21

22 New & Noteworthy

- 23 Since the activity of stretch reflex pathways contributes to locomotion, changing it through training may
- 24 improve locomotor rehabilitation in people with CNS disorders. Here we show for the first time that
- 25 people can change the size of soleus spinal stretch reflex through operant conditioning. Conditioned
- 26 stretch reflex change is the sum of task-dependent adaptation and long-term change, consistent with H-
- 27 reflex conditioning yet different from it in the composition and amount of the two components.

28

29 Introduction

30 In animals and humans, an operant conditioning protocol can increase or decrease the size of the 31 Hoffman reflex (H-reflex), which is produced by a wholly spinal pathway (Wolpaw, 1987; Chen and 32 Wolpaw, 1995; Carp et al., 2006; Thompson et al., 2009). Acquisition of this simple skill can alter the 33 pattern of muscle activation during walking in people and animals with spinal cord injury (Chen et al., 34 2011; 2014; Thompson and Wolpaw, 2015). Accumulating evidence suggests induction of complex 35 plasticity at many sites within the nervous system. Some of these changes clearly underlie the new skill 36 of a larger or smaller H-reflex while others are likely to be compensatory changes that prevent the 37 plasticity responsible for the new skill from interfering with pre-existing behaviors (Wolpaw and Lee, 38 1989; Wolpaw, 2010).

39 The H-reflex is elicited by weak electrical stimulation of the muscle nerve; it is often viewed as an 40 electrical analogue of the spinal stretch reflex, which can be increased or decreased by operant 41 conditioning (Wolpaw et al., 1983c; Evatt et al., 1989). Stretch reflex conditioning has several 42 advantages as a research model. First, the H-reflex is elicited mainly by synchronous activation of 43 primary afferent (group-Ia and large group-II) fibers, thus the afferent volley is minimally dispersed 44 when it arrives at the spinal motoneurons (Burke et al., 1983). In contrast, the stretch reflex can be 45 elicited by a rapid joint rotation, which produces a temporally dispersed activation of afferent fibers, the 46 same afferent may even fire several times (Matthews, 1972). The afferents are activated in a manner 47 similar to that occurring during natural movement (e.g., the stretch reflex is less affected by presynaptic 48 inhibition than is the H-reflex (Morita et al., 1998)). Second, unlike the H-reflex, the stretch reflex is 49 affected by muscle spindle sensitivity, and thus by changes in gamma drive (Matthews, 1972; Arris and 50 Henneman, 1980; Matthews1981). This provides a stretch reflex conditioning protocol an additional 51 mechanism for changing reflex size. Third, unlike the H-reflex, the stretch reflex comprises several 52 successive peaks of excitation. The first (M1) is generated mainly by group Ia afferents. Later peaks (M2 53 and M3) have contributions from Group Ib and II afferents (M2;(Schieppati and Nardone, 1997; Dietz, 54 1998; Schieppati and Nardone, 1999; Dietz and Duysens, 2000; Grey et al., 2001; Sinkjaer et al., 2004; 55 af Klint et al., 2010)) and from transcortical pathways (M3; (Marsden et al., 1973; 1977; Capaday et al., 56 1991; Palmer and Ashby, 1992; Petersen et al., 1998; Mrachacz-Kersting et al., 2006)). The pathways 57 responsible for these later peaks contribute to normal movement. Thus, the impact of M1 conditioning 58 on these pathways should also be monitored.

59 The present study set out to demonstrate the feasibility of operant conditioning of the soleus M1 stretch 60 reflex, to characterize the time course of M1 stretch reflex changes in conditioning responders, and to 61 compare those to the previous soleus H-reflex conditioning. It introduces a novel stretch reflex 62 conditioning protocol for the human soleus muscle based on the H-reflex conditioning protocol of 63 (Thompson et al., 2009). Each conditioning session began with a set of control trials in which feedback 64 was not provided. Thus, in contrast to previous stretch reflex conditioning studies in monkeys and 65 humans (Wolpaw et al., 1983b; Wolpaw and O'Keefe, 1984; Evatt et al., 1989; Wolf and Segal, 1996), 66 this study aimed to differentiate the task-dependent adaptation in reflex size that occurs within each 67 conditioning session from the long-term change that develops over many sessions and affects pathway 68 function outside of the conditioning paradigm. While task dependent adaptation is attributable to rapid 69 plasticity in the cortex (Thompson et al., 2009), long-term change reflects plasticity in the spinal cord 70 (Wolpaw, 1997; 2007). This study also assesses the effects of M1 conditioning on the M2 component of 71 the stretch reflex. The results and their differences from H-reflex conditioning provide new insights into 72 the mechanisms wider effects of spinal reflex conditioning. and

73 Materials and Methods

74 Participants: Fourteen participants (8 women, 6 men; ages 19-35 years) provided written informed 75 consent for the study. Three participated in both up and down-conditioning protocols, with at least six 76 months between the two protocols. Since up- and down-conditioning are physiologically different 77 phenomena (Carp and Wolpaw, 1994; 1995; Carp et al., 2001a; 2001b; Wolpaw and Chen, 2001), the 78 first direction of conditioning would not affect the second direction of conditioning (Thompson et al., 79 2009). All participants were free of any known physical or neurological disorders. Approval for the 80 study was provided by the scientific ethics committee for Nordjylland (Reference Number: N-81 20120044). The study was performed in accordance with the Declaration of Helsinki.

82 Operant conditioning study overview: After attending a familiarization session (see Familiarization 83 session below), each participant completed 6 baseline sessions and 24 up-conditioning or 24 down-84 conditioning sessions that occurred at a pace of 3 times per week. Figure 1 shows the operant 85 conditioning session schedule and the set-up for stretch reflex elicitation. In each session, after preparing 86 for the soleus and tibialis anterior (TA) EMG recording (see the section below), the soleus H-reflex/M-87 wave recruitment curve was obtained during natural standing with a stable level of soleus and TA 88 background EMG activity. Then, 245 trials of stretch reflexes were elicited while the sitting participant 89 produced approximately 10% maximum voluntary contraction (MVC) level of soleus EMG activity and 90 no activation of the TA with the right lower leg fixed on the custom-made apparatus (Figure 1B) (see 91 Session protocol below). In baseline sessions, all 245 reflexes were elicited without any feedback on 92 reflex size. In contrast, in each conditioning session, the first 20 reflexes were elicited without any 93 feedback on reflex size, and then 225 conditioning reflexes were elicited. In these 225 conditioning 94 trials, the participant was asked to increase (up-conditioning) or decrease (down-conditioning) the size of 95 M1 reflex with the aid of visual feedback, which showed after each perturbation whether the resulting 96 reflex was larger (for up-conditioning) or smaller (for down-conditioning) than a criterion value. Soleus 97 and TA background EMG levels were kept stable throughout data collection. In order to avoid session-98 to-session variability in the location of electrodes, the positions of all electrodes were mapped in relation 99 to landmarks on the skin (e.g., moles or scars) during the familiarization session. To prevent the potential 100 diurnal variation in reflex size from affecting the results, each participant's sessions always occurred at 101 the same time of day (i.e., within the same 3-hr time window). A typical baseline or conditioning session 102 took about 1.5 hour.

103 [Figure 1 near here]

EMG recording: Electromyographic (EMG) activity was recorded with custom-made amplifiers and surface Ag/AgCl electrodes (Medicotest 720-01-K) placed over the belly of the right soleus (SOL) and tibialis anterior (TA) muscles in accordance with the recommendations of (Cram and Criswell, 2011) to optimize recording from these muscles and avoid contamination from other muscles. EMG activity was amplified using custom made EMG amplifiers, filtered at 20 Hz- 2kHz, and digitized (2 kHz) with
scientific software Mr. Kick II 2.3 (Knud Larsen, Center for Sensory-Motor Interaction, Aalborg
University, Denmark) and stored for later off-line analysis.

111 Familiarization session: All participants attended one familiarization session in which the experimental 112 procedures were explained and implemented. This was to ensure that participants were comfortable with 113 the electrical stimuli and perturbations that would elicit a stretch reflex (Figure 1C). During this session, 114 the participants were asked to perform the maximal isometric voluntary SOL contraction (MVC) while 115 standing. The instructions were to rise up on the toes as rapidly as possible and to hold this for 1 s. This 116 was repeated twice and the best effort (quantified by the rectified SOL EMG amplitude) was defined as 117 the MVC. Absolute soleus EMG amplitude range for 5-15% MVC (i.e., centering 10% MVC) level 118 determined during the familiarization session was used for all stretch reflex measurements in the 119 familiarization session and in all subsequent sessions. During stretch reflex trials, participants were 120 asked to tonically activate the right SOL to produce this pre-set level of absolute EMG activity while 121 sitting in a custom-made apparatus chair (Figure 1B) with their right TA silent. EMG electrode locations 122 were mapped in relation to permanent marks on the skin (e.g., moles and scars) so that they could be 123 maintained the same throughout the rest of the study for each participant.

124 Custom joint-rotation device and stretch reflex elicitation: During all stretch reflex measurements, 125 participants were seated in a custom-made chair that was fixed to the floor, with their knee joint flexed at 126 approximately 60° (Figure 1B). The right foot was fixed to a servo-controlled electrical actuator, such 127 that the anatomical ankle axis of rotation was closely aligned with the fulcrum of the actuator and the 128 foot rested on a footplate. This position minimized both hip and knee movement, ensuring that the 129 movement of the actuator was transmitted solely to the ankle joint. This knee position also minimized 130 the possible influence of gastrocnemius activity on the soleus stretch reflex; the gastrocnemius muscle is biarticular with two heads arising from just above the femoral condyles, and act both to flex the knee 131 132 joint and to plantarflex the ankle joint. The left foot was placed on a custom-made plate that extended 133 from the actuator such that the left leg was in the same starting position as the right leg. The angular 134 position of the actuator was monitored with an angular displacement transducer (Transtek DC ADT 135 series 600). To elicit the stretch reflex, 6° of dorsiflexion rotation was applied at 175°/s with randomly 136 varying intervals of 5-7 s, when the participants had maintained a background SOL contraction of 5-15% 137 MVC for at least 2 s.

138 Session protocol: In each of the baseline and conditioning sessions, first, an H-reflex/M-wave 139 recruitment curve was measured. Then, 245 stretch reflex trials were performed. Exact session 140 procedures are described here.

141 After EMG electrode placement, an H-reflex/M-wave recruitment curve was obtained while the 142 participants stood upright and provided the pre-set level (i.e., 5-15% of MVC level, determined during 143 the familiarization session) of background activation in SOL. Using an isolated stimulator (Noxitest IES 144 230), monopolar stimulation of the tibial nerve of the right leg was produced with the cathode (PALs 145 Platinum round electrode, model 879100, 3.2 cm diameter, Axelgaard Man. Co. Ltd.) in the popliteal 146 fossa and the anode (PALs Platinum rectangular electrode, model 895340, 7.5 x 10 cm, Axelgaard Man. 147 Co. Ltd.) on the anterior aspect of the knee at the level of the patella. The cathode location was adjusted 148 to maximize the soleus M-wave. Stimuli were delivered every 5-7 s if the background level of SOL 149 activation had been maintained at the pre-set level (i.e., 5-15% MVC) for at least 2 s. Stimulus intensity 150 was increased in 5-mA increments, with three to four stimuli at each level, until an M-wave [with the 151 size >50 uV] was observed; this was deemed the motor threshold (MT). Stimulus intensity continued to 152 increase until M-wave peak-to-peak amplitude plateaued; this was defined as M_{max}. Then, the scientific 153 software Mr. Kick II 2.3 (Knud Larsen, Center for Sensory-Motor Interaction, Aalborg University, 154 Denmark) was used to control the output of the stimulator such that 10 different stimulation intensities 155 (up to that producing M_{max}) were applied randomly with three stimuli at each intensity. Stimuli were 156 delivered every 5-7 s only if the background level of activation had been maintained at the required 157 level for at least 2 s. The peak-to-peak values of the H-reflex and M-wave for each trial was extracted 158 and the recruitment curves were constructed. Typically, the same range of stimulus intensities were used 159 for all baseline and conditioning sessions. The same stimulus location was maintained throughout the 160 study for each participant.

Next, the soleus stretch reflexes were elicited in one block of 20 control trials followed by three blocks of 75 control trials (in a baseline session) or 75 conditioning trials (in a conditioning session). During control trials, no feedback was provided as to M1 size, and participants were not asked to increase or decrease it. During conditioning trials (i.e., three sets of 75 trials in each of 24 conditioning sessions), participants were asked to either increase (M1up) or decrease (M1down) the size of the M1 component of the stretch reflex. Immediate visual feedback was provided indicating whether the trial was a success (i.e., whether M1 size was above (M1up) or below (M1down) a size criterion (Figure 1D).

168 Visual feedback: Visual feedback provided to the participant is essentially the same as the one used in 169 the previous H-reflex conditioning studies (Thompson et al., 2009; 2013; Makihara et al., 2014), except 170 that the feedback targeted the M1 response, instead of the H-reflex.

A screen ~1.5 m in front of the participant provided visual feedback on the ongoing SOL EMG activity level (left) and the size of the M1 component of the SOL stretch reflex (right), which occurred typically 39±2 ms after the onset of perturbation (Figure 1C). The background EMG panel (Figure 1D) was the same for both control and conditioning trials. The shaded area of the background EMG panel represented the target window (i.e., corresponding to the 5-15%MVC range, determined during the familiarization session), within which the SOL EMG activity had to be maintained prior to reflex elicitation. The bar 177 indicated the SOL EMG level in real-time and was updated every 100 ms; it was green if the EMG level

178 stayed within the shaded area and red if it did not.

179 The M1 panel (Figure 1D) differed between control trials, during which the participant was not asked to 180 modify M1 size, and conditioning trials, during which the participant was asked to increase (M1up) or 181 decrease (M1down) M1 size. During control trials, the shaded area of the M1 panel indicating the range 182 of M1 sizes that satisfy the reward criterion, was set as large as possible so that all trials with various M1 183 sizes would be registered as "success". During conditioning trials, this shaded area covered only the 184 upper (for M1up) or lower (for M1down) portion of the panel; with M1up, the bottom border of the 185 shade represented the reward criterion, while with M1down the top border represented the reward 186 criterion. For how the reward criterion was calculated, see the paragraph below. When M1 size satisfied 187 the criterion (i.e., when the top of the bar (i.e., M1 size) got in the shaded area), the bar was green, 188 indicating success; when M1 size did not satisfy the criterion (i.e., the top of the bar got out of the 189 shaded area), the bar was red, indicating failure. This feedback appeared 200 ms after the imposed ankle 190 rotation began.

191 As described in previous studies (Thompson et al., 2009; 2013; Makihara et al., 2014), the reward 192 criterion level was based on the average reflex size for the previous block of trials. Thus, in each 193 conditioning session, the criterion level for the first block of 75 conditioning trials was based on the 194 immediately preceding block of 20 control trials, and the criterion levels for the second and third blocks 195 of conditioning trials were based on the immediately preceding block of 75 conditioning trials. The 196 criterion level was calculated such that if M1 sizes for the new block were similar to those for the 197 previous block, 50-60% of the trials would be successful (Chen and Wolpaw, 1995; Thompson et al., 198 2009). The thick horizontal line represents the average M1 size for the six baseline sessions. Thus, the 199 participants also received information as to their current performance in relation to their average initial 200 M1 size. The percentage of successful trials within the current block was displayed at the bottom of the 201 screen and updated after each trial, while the number of completed trials was shown at the top of the 202 screen.

203 Data analysis: To calculate M1 size for each participant's session, M1 size was defined as a root mean 204 square (RMS) value of the rectified SOL EMG in the M1 window minus an RMS value for 100 ms of 205 pre-perturbation period. For each participant, the M1 window was determined as a 10-ms window 206 including the M1 peak (the first peak response that occurred around 45 ms after perturbation onset) by 207 visual inspection (e.g., Figure 1C). Then, the average size was calculated for the 20 within-session 208 control trials, each block of 75 trials, and for all three blocks of 75 trials together. Values were expressed 209 as a percentage of their average values for the six baseline sessions. The size of M2, the second set of 210 peak responses that occur around 60 ms post perturbation onset, was also calculated in a similar way.

211 The M2 window was typically around 58-68 ms after perturbation onset, whereas a typical M1 window

212 was around 42-52 ms (see Figure 1C).

To determine for each participant if the conditioning (M1up or M1down) had been successful, the average M1 size for the three 75-trial blocks of conditioning trials in the last six conditioning sessions (sessions 19-24) were compared to that for the three blocks of 75 control trials of the six baselines by a single-tail *t*-test. A significant change in M1 size (p<0.05) in the direction of conditioning (i.e., increased for M1up, decreased for M1down) defined successful conditioning.

218 Regardless of whether the data are from a baseline session or a conditioning session, for each participant, 219 M1 sizes from all three 75-trial blocks were averaged together and called "conditioned M1," and M1 220 sizes from the 20 control trials were averaged together and called "control M1." The final effect of the 221 protocol on the conditioned M1 size was calculated by averaging the M1 size for the three 75-trial 222 blocks of conditioning sessions 22–24 and expressing the value as a percentage of the average M1 size 223 for the three 75-trial blocks of the six baseline sessions. The final effect on the control M1 size was 224 calculated by averaging the M1 size for the 20 control trials of conditioning sessions 22-24 and 225 expressing the value as a percentage of the average M1 size for the first 20 trials of the six baseline 226 sessions. To assess the time course of changes, a repeated-measures ANOVA was used to evaluate 227 conditioned and control M1 sizes across successive 6-session bins (i.e., baseline sessions 1-6 and 228 conditioning sessions 1-6, 7-12, 13-18, and 19-24). Comparable procedures were used to assess the 229 impact of the conditioning protocol on the M2 component of the stretch reflex. This procedure was 230 chosen over characterizing the learning via a function, based on the inter-session variability of the 231 reflexes.

In order to assess the session-to-session variability in EMG recording condition, the peak-to-peak M_{max} and the peak-to-peak H_{max} were calculated from the recruitment curve measured at the beginning of each session. To assess the stability of background EMG activity across sessions, the SOL and tibialis anterior background EMG were calculated for each session, along with M1 and M2 sizes. These values were evaluated with a repeated-measures ANOVA, in the same way as the time course evaluation for M1 and M2 changes.

238

239 Results

240 Stability of the M_{max}, H_{max}, and background EMG

241 In order to ensure that M1 changes over sessions were not due to inter-session differences in electrode 242 placements, we measured the M_{max} at the beginning of every session. Across all M1up participants, the 243 M_{max} averaged 7.7±0.2 (SE) mV during the baseline sessions and 7.7±0.2 mV during the conditioning 244 sessions. One-way repeated measures ANOVA revealed no significant difference across the sessions 245 $(F_{(4,28)} = 0.91, p = 0.47)$. Similarly, the M1down group showed no significant difference across sessions 246 $(F_{(4,28)} = 1.01, p = 0.42; M_{max}$ baseline sessions: $6.5\pm0.8 \text{ mV}$; conditioning sessions: $6.5\pm0.8 \text{ mV}$). H_{max} 247 did not change significantly across sessions for either the M1up ($F_{(4,28)} = 0.899$, p = 0.48) or the M1down 248 group ($F_{(4,28)} = 0.47$, p = 0.76); it averaged 3.3±0.2 mV for M1up and 2.8±0.4 mV for M1down during 249 the baseline sessions and 3.5±0.2 mV for M1up and 2.8±0.2mV for M1down during the conditioning 250 sessions. SOL background EMG also remained stable throughout the study; $F_{(4.28)} = 0.335$, p = 0.852 for 251 the M1up group; $F_{(4,28)} = 0.338$, p = 0.850 for the M1down group, by one-way repeated measures 252 ANOVA. TA background EMG remained at resting level (i.e., <5 µV) in both groups throughout the 253 study. Overall, SOL M_{max} and H_{max}, and SOL and tibialis anterior background EMG values all remained 254 within $\pm 10\%$ of the baseline values throughout the study. Stability of these values in the M1up and 255 M1down groups of participants in whom conditioning was successful is displayed in Figure 2 and 256 summarized in Table 1.

257

[Figure 2 and Table 1 near here]

258 M1 and M2 stability in the baseline sessions

All participants completed six baseline sessions in each of which 245 control reflexes were elicited. There was no significant difference in average M1 size between the initial 20 control trials and the subsequent 225 control trials in either the M1up or M1down group (all participants included, two-tailed paired t-test, p = 0.99 for each group). M1 size did not differ significantly among the three 75-trial blocks nor across the baseline sessions (block × session interaction, p = 0.13 (M1Up) and p = 0.99(M1down)).

265 There was no significant difference in average M2 size between the initial 20 trials and the subsequent

266 225 trials in either the M1up or M1down (two-tailed paired t-test, p = 0.99 for both types of training).

267 M2 size did not differ significantly among the three 75-trial blocks nor across the baseline sessions

268 (block \times session interaction, p = 0.41 (M1Up group) and p = 0.47 (M1down group)).

269 The effect of conditioning on the size of the conditioned M1 reflex

As noted above, for each session, the data for the three 75-trial blocks were combined to calculate the average conditioned M1 reflex size, which is referred to as "the conditioned M1 size" and is expressed 272 as a percentage of the participant's average M1 size for the three 75-trial blocks of the six baseline 273 sessions. Across all participants (i.e., N=8 for M1up and N=8 for M1 down) there was a significant 274 change between the baseline session and the last six conditioning sessions (paired t-test, one-tailed, p =275 0.02 and p < 0.001 for M1up and M1 down respectively). By the analysis described in Methods, 276 conditioning was successful in five of eight M1up participants and in all eight M1down participants. In 277 the other three M1up participants, M1 size did not change significantly. Of the three participants who 278 completed both the Mlup and Mldown protocols, two were successful in both while one was 279 unsuccessful in M1up conditioning and subsequently (>6 months later) was successful in M1down conditioning.) Figure 3A shows the final conditioned M1 sizes (defined as the average conditioned M1 280 281 sizes for sessions 22-24) for the eight M1up and the eight M1down participants. The filled symbols 282 represent the successful and the open symbols the unsuccessful participants. Since the main aim of this 283 study was to characterize the time course of M1 and M2 changes in the responders of M1 conditioning, 284 the rest of this presentation focuses primarily on the data from the 13 successful participants (5 M1up 285 and 8 M1 down).

286 [Figure 3 near here]

287 The bottom panels of Figure 4 show the average rectified SOL EMG data of the three 75-trial blocks for 288 one baseline session and the last conditioning session in single participants. The top panels show the 289 ankle angle during these stretch reflex trials. Figure 5A summarizes the time course of M1 size changes 290 for the successfully conditioned participants of both groups; each symbol indicates the group average 291 (\pm SE) for each session. The conditioned M1 size increased in the M1up group (F_(4,16) = 4.46, p =0.013; and decreased in the M1down group ($F_{(4,28)} = 18.79$, p <0.001) (top panel). The final conditioned M1 292 293 size was $143\pm15SE$ % for the M1up group and $62\pm6\%$ for the M1down group. To aid in assessing the 294 time course of M1 changes, the time course of H-reflex changes using data from (Thompson et al., 2009) 295 is displayed in Figure 5B.

296

[Figure 4 and 5 near here]

297 The effect of conditioning on the size of the control M1 reflex

298 As defined in Methods, the M1 reflex obtained in the first 20 control trials of the control sessions and the 299 20 control trials of the conditioning sessions is referred to as the "control M1." The middle panel of 300 Figure 5A shows the time course of control M1 size changes across six baseline and 24 conditioning 301 sessions for the M1up and M1down participants; each symbol represents the group mean (±SE) for each 302 session, expressed as a percent of its baseline value. The control M1 size increased in the M1up group 303 $(F_{(4,16)} = 3.09, p = 0.046; and decreased in the M1down group (F_{(4,28)} = 6.72, p = 0.001)$. The final control 304 M1 size was $126\pm18(SE)\%$ of baseline for the M1up group, and $75\pm8\%$ of baseline for the M1down 305 group.

It appears that the control M1 requires more time to change, compared to the conditioned M1 reflex. For the M1up group, the conditioned M1 size was consistently above baseline values from conditioning Session 1 on, while the control M1 did not exceed the baseline value until Session 10. For the M1down group, the conditioned M1 was consistently below the baseline by Session 4 while it was not until Session 16 that the control M1 was consistently below baseline. Although the onset was delayed, the control M1 change was obvious towards the end. Figure 6 shows a typical example of control M1 change with M1down conditioning.

313 [Figure 6 near here]

314 Within-session task-dependent adaptation in the M1 reflex

315 To quantify the task-dependent change in the M1 reflex from control trials to conditioning trials, for 316 each session, the control M1 size was subtracted from its conditioned M1 size (the bottom panel, Figure 317 5A). A within-session difference in the correct direction (i.e., positive for the M1up group and negative 318 for the M1down group) is referred to as task-dependent adaptation (Thompson et al., 2009). It appears in 319 session 1 for M1up participants and by session 4 for M1down participants, and it remains about the same 320 over the remaining sessions. Its average final (sessions 22-24) values are $24\pm9SE$ % and $-15\pm4\%$ for the 321 M1up and M1down groups, respectively. Notably, the amount of task-dependent adaptation with up-322 conditioning was larger with M1up than with HRup (p=0.01 by unpaired t-test for sessions 1-24). Figure 323 7 shows an example of within-session task dependent adaptation in a typical M1up participant.

324 [Figure 7 near here]

325 Table 1 summarizes for the M1up and M1down participants the changes in control and conditioned M1 326 reflexes and their within-session difference (i.e., task-dependent adaptation) across the conditioning 327 sessions grouped into four 6-session bins (C1-6, C7-12, C13-18 and C19-24). To delineate the 328 similarities and differences between M1 conditioning and H-reflex conditioning, the data from this study 329 are presented with the previous H-reflex conditioning data (Thompson et al., 2009). Significant 330 differences from the average of the six baseline sessions are indicated by asterisks. Table 1 verifies the 331 control/conditioned M1 differences in the onset of the impact of conditioning. For the M1up group the 332 within-session difference is significant from the first bin of 6 sessions on, while the conditioned M1 is 333 significantly different from the second bin of 6 sessions and the control M1 is not significantly different 334 until the fourth (and final) bin. For the M1down group, the within-session difference is significant from 335 the third 6-session bin, the conditioned M1 is significantly smaller from the second 6-session bin and the 336 control M1 is not significantly different until the fourth bin.

337 The effect of M1 conditioning on the size of the M2 reflex

338 Similar to the M1 size calculation, the M2 values from the three 75-trial blocks were combined to 339 calculate the average M2 size for each conditioning session; this is referred to as "the conditioned M2"

- 340 size and expressed as a percentage of the participant's average M2 size across the six baseline sessions.
- 341 M1 conditioning changed M2 size in the direction of M1 conditioning in 4 of the 8 M1up participants
- 342 and in 5 of the 8 M1down participants. For the whole group, the final conditioned M2 did not change
- 343 significantly in the successful M1up group (N=5, p = 0.28, by paired t-test) or successful M1down group
- (N=8, p=0.16), (Figure 3B). Final conditioned M2 size averaged $120\pm32\%$ for the successful M1up and
- 345 89±10% for the successful M1down group, respectively. Final control M2 size was 118±32% for the
- 346 successful M1up and 99±5% for the successful M1down group, respectively. The final M2 within-
- 347 session change was $2\pm14\%$ and $-10\pm9\%$ for the M1up and M1down groups, respectively. Table 2
- 348 summarizes the changes in conditioned M2, control M2, as well as M2 within-session change across the
- 349 four 6-session bins of conditioning sessions (C1-6, C7-12, C13-18 and C19-24).
- 350 [Table 2 near here]

351 Discussion

352 This is, to our knowledge, the first demonstration of operant conditioning of the M1 component of the 353 human soleus stretch reflex. The reflex changed without alterations in background EMG, initial muscle 354 length, or imposed perturbation. M1up conditioning was successful in five of eight participants and 355 M1down conditioning in all eight participants. M1 size increased to 143±15% of its initial value in the 356 successful M1up participants and decreased to 62±6% in the M1down participants. These success rates 357 are similar to those for soleus H-reflex and biceps stretch reflex conditioning in animals (Wolpaw, 1983; 358 Wolpaw et al., 1983a; Wolpaw, 1987; Chen and Wolpaw, 1995; Carp et al., 2005) and humans (Evatt et 359 al., 1989; Wolf and Segal, 1996; Thompson et al., 2009).

The results are particularly notable in two respects. First, they confirm the two-phase acquisition of an operantly conditioned spinal reflex increase or decrease, hypothesized in 1984 (Wolpaw and O'Keefe, 1984) and first documented in 2009 (Thompson et al., 2009). Second, they assess the impact of M1 conditioning on the M2 component of the stretch reflex. Because the stretch reflex is more directly related to motor function than the H-reflex, both of these contributions illuminate the implications of spinal reflex conditioning for understanding normal motor function and for developing protocols that can address the reflex abnormalities associated with spinal cord injury, stroke, or other chronic disorders.

367 Task-dependent adaptation and long-term change in M1

368 As in soleus H-reflex conditioning (Thompson et al., 2009), the data reveal a two-phase phenomenon; 369 task-dependent adaptation within conditioning sessions (phase 1) and long-term change across 370 conditioning sessions (phase 2). However, the time courses of these two phases differed from those 371 found for the soleus H-reflex (Thompson et al., 2009). The task-dependent adaptation for a conditioning 372 session was defined as the conditioned M1 size (M1 size for the 225 conditioning trials) minus the 373 control M1 size (M1 size for the 20 control trials). Thus, it shows the immediate effect of asking the 374 participant to increase (or decrease) M1 and providing immediate feedback as to whether the size 375 criterion was met. In contrast, long-term change was indicated by the increase (or decrease) in the 376 control M1 size over conditioning sessions. Thus, it assesses the persistent effect of the conditioning 377 sessions.

In the present results, task-dependent adaptation first appeared in conditioning session one (M1up) or four (M1down) and remained stable over the remaining sessions. Long-term change appeared in session (M1up) or session 16 (M1down) and grew gradually over the remaining sessions. The difference between the M1up and M1down groups in the onset of task specific adaptation and long-term change (also seen for soleus H-reflex conditioning (Thompson et al., 2009)) is further evidence that upconditioning and down-conditioning are not mirror images of each other but have different mechanisms (Wolpaw, 2007; Thompson et al., 2009). The development of the two phases over the course of up- and down-conditioning with M1 or H-reflex conditioning (Thompson et al., 2009) are summarized in Table 1. M1up conditioning produces greater task-dependent adaptation and less long-term change (although insignificant) than does H-reflex up-conditioning; in contrast, M1down conditioning produces comparable task-dependent adaptation and greater (although insignificant) long-term change compared to H-reflex down-conditioning. Overall, for both task-dependent adaptation and long-term change, the time courses of development are similar for M1 and H-reflex conditioning.

391 How do we interpret the differences and similarities between M1 and H-reflex conditioning? The H-392 reflex is referred to as the electrical analog of the M1 stretch reflex. A principal difference is that the H-393 reflex by passes the muscle spindle while M1 is affected by the sensitivity of the spindle and thus by γ -394 motoneuron activity. This may constitute an extra degree of freedom available for participants as they 395 learn to change M1 size. Muscle spindle excitation is affected by initial muscle length (Matthews, 1972) 396 and muscle background activity (Marsden et al., 1976; 1983). Both of these variables were maintained 397 stable throughout the study; thus, it is unlikely that they contributed to the changes. It is possible that 398 alterations in γ -motoneuron activity contributed to M1 change, as suggested for monkey biceps M1 399 conditioning (Wolpaw and O'Keefe, 1984).

400 Another potential site of change is the Ia-synapse, known to be modulated by presynaptic inhibition 401 (Eccles et al., 1962; Stein, 1995). This inhibition is influenced by corticospinal, reticulospinal and 402 vestibulospinal pathways (Iles, 1996; Meunier and Pierrot-Deseilligny, 1998; Pierrot-Deseilligny and 403 Burke, 2012; Baldissera et al., 1981) and is task-dependently modulated (Hultborn et al., 1987; Hultborn 404 and Meunier, 1987; Stein and Capaday, 1988; Stein, 1995; Côté and Gossard, 2003). Morita et al. 405 (Morita *et al.*, 1998) reported evidence that the stretch reflex is less sensitive to presynaptic inhibition 406 than the H-reflex; this is not consistent with the present finding that the conditioned M1 change is 407 greater than the H-reflex change. In the present study, M1up produced a larger within-session M1 408 increase (task-dependent adaptation), for which the most plausible mechanism is a change in presynaptic 409 inhibition (Capaday and Stein, 1987). Indeed, a release of presynaptic inhibition at the segmental level 410 has been implicated to be a mechanism responsible for the increase in H-reflex and stretch reflex size 411 during the Jendrassik maneuver (Dowman and Wolpaw, 1988; Zehr and Stein, 1999). However, in the 412 current study, participants were instructed to maintain the upper body (including facial muscles) relaxed 413 throughout all the reflex trials. Thus, changes in presynaptic inhibition via the Jendrasski maneuver are 414 unlikely to have occurred here. In addition to presynaptic inhibition, animal studies, which would 415 capture long-term physiological and/or anatomical changes, provide substantial evidence of altered 416 motoneuron properties, in GABAergic terminals on motoneurons, and possibly in oligosynaptic afferent 417 pathways (Wolpaw, 1997; 2010; Thompson and Wolpaw, 2014). Further studies are needed to identify 418 the mechanisms underlying M1 and H-reflex conditioning and the extent to which they differ.

419 The effect on the M2 component of the soleus stretch reflex

420 For M1up and M1down groups, the changes in M1 did not have large or consistent effects on M2 size. 421 This differs from stretch reflex conditioning in the biceps brachii M1, which produced significant 422 changes in M2 (Wolf et al., 1995). Since the M2 of upper limb muscles is likely generated through 423 transcortical pathways (Crago et al., 1976; Marsden et al., 1977; Rothwell et al., 1986; Goodin et al., 424 1990; Capaday et al., 1991; Thilmann et al., 1991; Palmer and Ashby, 1992), it might be more 425 comparable to the M3 for lower limb muscles (Petersen et al., 1998; Mrachacz-Kersting et al., 2006). 426 (Note that the M3 was not measurable in the present study in which the conditioning protocol was 427 administered in sitting participants.) The M2 of the soleus muscle is thought to be largely mediated by group Ib and/or group II afferents (Schieppati and Nardone, 1997; Dietz, 1998; Schieppati and Nardone, 428 429 1999; Dietz and Duysens, 2000; Grey et al., 2001; Sinkjaer et al., 2004; af Klint et al., 2010). Thus, the 430 soleus M2 is not comparable to the M2 of the biceps brachii.

431 A possible explanation why M2 did not change consistently, is a potentially mixed origin of M2. 432 Because the distinction between M1 and M2 is based on their latencies, there is a possibility that delayed 433 Ia excitation of motoneurons may contribute to M2, in addition to the excitation from Ib and/or group II 434 afferents. With M1up conditioning, such delayed Ia excitation could decrease, as those motoneurons 435 could start firing in the M1 time window. This explanation seems feasible in some, but not all 436 participants, however. Another explanation is related to the functional relevance of M2 during the sitting 437 task in the current study. It is unlikely that the M1 or M2 in the soleus would have significant function in 438 the sitting posture, thus changes in M2 would not necessarily reflect systematic changes (compensatory 439 or reactive plasticity (Wolpaw, 2010)). Future studies should condition the soleus stretch reflex during 440 more functional tasks, such as standing as has been done for the soleus H-reflex conditioning (Thompson 441 et al., 2009; Makihara et al., 2014).

442 Functional Implications

443 Several types of afferents generate the stretch reflex; Group Ia and II afferents arising from muscle 444 spindles, Group Ib afferents from Golgi tendon organs, and cutaneous afferents. Providing perturbations 445 such as the ankle joint rotations used here, is one way to probe these pathways and quantify their role 446 during tasks such as walking. These perturbations activate the afferents in a manner similar to what 447 occurs during normal behaviour: they are dispersed in time and the same afferents may be activated 448 several times. Additionally, and unlike the H-reflex, the stretch reflex size is affected by the sensitivity 449 of the muscle spindle, and thus by descending gamma drive. Conditioning of the stretch reflex thereby 450 provides a more natural paradigm into the adaptations of the underlying circuitry.

451 Appropriate soleus H-reflex conditioning leads to a return to a more normal gait pattern in spinal cord 452 injured animals and humans (Chen et al., 2006; Manella et al., 2013; Thompson et al., 2013). This 453 favourable effect on locomotion results from the H-reflex changes triggering much wider beneficial 454 plasticity (Thompson et al., 2013; Thompson and Wolpaw, 2014). While the H-reflex depends mainly on

- 455 the Ia afferent pathway, Group Ib and II afferents appear to play a prominent role in generating soleus
- 456 locomotor activity in humans (Schieppati and Nardone, 1997; Dietz, 1998; Schieppati and Nardone,
- 457 1999; Dietz and Duysens, 2000; Grey et al., 2001; Sinkjaer et al., 2004; af Klint et al., 2010). Thus,
- 458 operant conditioning of the soleus stretch reflex, which engages these other pathways, might prove to be
- 459 a more efficient and/or effective therapeutic approach than H-reflex conditioning.

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- 610

611 **Table 1:** Soleus and tibialis anterior background EMG during stretch reflex trials and the soleus M_{max} 612 and H_{max} values during standing for each of successive 6-session blocks.

	Group	B1-6	C1-C6	C7-C12	C13-C18	C19-C24
Soleus EMG (µV)	M1up	15.8±1.7	15.8±1.4	15.2±1.6	14.9±1.7	15.6±1.8
	M1down	16.4 ± 2.8	16.4±2.7	15.7±2.6	16.3 ± 2.8	16.1±2.5
TA EMG (µV)	M1up	3.6±0.4	4.2 ± 0.2	3.9±0.3	3.8±0.4	4.0±0.5
	M1down	3.6±0.3	$3.9{\pm}0.3$	3.8 ± 0.4	3.8±0.4	3.7±0.4
Soleus M _{max} (mV)	M1up	8.1±0.6	$8.2{\pm}0.7$	8.5±0.6	8.4±0.7	$8.4{\pm}0.7$
	M1down	6.7 ± 0.9	$6.7{\pm}0.9$	6.7 ± 0.9	6.6 ± 0.9	6.7 ± 0.9
Soleus H _{max} (mV)	M1up	3.9±0.5	4.1±0.6	4.3±0.5	4.3±0.6	4.3±0.7
	M1down	2.7 ± 0.4	$2.7{\pm}0.6$	2.7 ± 0.6	2.6 ± 0.5	2.6 ± 0.5

All values are mean ± SE for successful M1up or M1down participants, and are expressed as percentage

of baseline values. None of the values from conditioning sessions are significantly different from the

615 values from baseline sessions.

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618 **Table 2:** M1 reflex values for all successful M1up and M1down participants compared to H-reflex

values for all successful HRup and HRdown participants from the study by Thompson et al. (2009) foreach of successive 6-session blocks.

	Group	C1-C6 (%)	C7-C12 (%)	C13-C18 (%)	C19-C24 (%)
Conditioned and a	M1up	116.9±6.8*	136.8±12.7*	145.7±22.4*	141.2±17.2*
Conditioned reliex	HRup	115.6±6.2	122.4±5.5*	127.6±7.5*	137.3±8.6*
Control reflex	M1up	96.6±4.3	109.5±5.6	118.4±11.2*	117.2±10.9*
	HRup	106.4 ± 6.0	106.7±3.7	116.5±4.9	128.2±5.4*
Within gassion shange	Mlup	20.3±6.2*	27.2±8.5*	27.3±12.5*	24.0±7.9*
within-session change	HRup	9.2±5.4	15.6±4.1*	11.6±4.2*	$-12.4 \pm 6.0*$
Conditioned weflow	M1down	92.9±5.1	84.9±6.2*	74.4±5.9*	62.1±7.1*
Conditioned reliex	HRdown	93.4±4.0	81.7±4.4*	75.1±4.9*	72.3±5.3*
Control woflow	M1down	100.0±5.8	96.8±4.2	89.2±6.5	77.5±5.5*
Control reliex	HRdown	97.1±1.8	95.5±2.8	90.5±4.5	86.7±5.9*
Within-session change	M1down	-7.5±3.8	-11.9±5.2	$-14.8 \pm 5.0*$	-15.3±4.0*
	HRdown	-3.8 ± 3.2	-13.9±3.2*	$-14.4 \pm 5.1*$	-14.4±6.3*

621 Values represent the average \pm SE and are expressed as percentage of baseline values.

622 * Significant differences from the six baseline sessions (p < 0.05, LSD *post hoc* after repeated measures 623 ANOVA).

624 * H-reflex values are from Thompson et al., (2009).

625

626 **Table 3:** M2 stretch reflex values for all successful M2up and M2down participants for each of

627 successive 6-session blocks.

	Group	C1-C6 (%)	C7-C12 (%)	C13-C18 (%)	C19-C24 (%)
Conditioned M2 reflex	M1up	119.4±17.5	126.3±30.1	126.8±28.2	122.7±23.6
	M1down	110.4 ± 7.7	104.8 ± 11.5	97.5±9.3	89.9±9.6
Control M2 reflex	M1up	111.2 ± 14.6	129.1±30.9	139±40.2	124.4±26.3
	M1down	111.4 ± 3.9	110.5±7.7	100.1 ± 8.3	97.4±6.5
Within-session change	Mlup	8.2±9.3	-2.8±12.4	-12.2±16.5	-1.7±11.6
	M1down	-1.0 ± 5.7	-5.7±4.8	-2.6 ± 8.3	-7.5 ± 6.8

628 Values represent the average \pm SE and are expressed as percentage of baseline values.

629 * Significant differences from the six baseline sessions (p < 0.05).

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635 Figure 1: (A) Study session schedule. Six baseline sessions are followed by 24 conditioning sessions, all 636 at pace of 3 sessions per week. (B) The stretch reflex pedal. Participants are seated comfortably with 637 both feet on separate foot plates. (C) The upper panel shows the change in ankle angle in degrees, the 638 lower panel depicts the activity of the soleus muscle following a single imposed dorsiflexion 639 perturbation. Several peaks may be seen labelled as M1 and M2. The grey shaded area visualizes the 640 time window for the M1 for which the participants received feedback during the conditioning sessions. 641 (D) Visual feedback. The feedback on the screen is comprised of two parts, the background EMG and 642 the stretch reflex size both shown as bars. The shaded area in the left panel represents the pre-set range 643 for the soleus background activity, which must be maintained for at least 2s by the participant for a 644 stretch reflex trial to occur. The shaded area in the right panel represents the targeted range for the size 645 of M1 component. During control trials, this right shaded area is set as large as possible since the 646 participant is not training to modify the M1 size. During M1up conditioning trials, this shaded area 647 appears in the upper half (i.e., a criterion level and above), based on the baseline sessions. In contrast, 648 during M1 down conditioning trials, this area appears in the lower half (i.e., a criterion level and below). 649 Immediately after a stretch reflex trial occurs (i.e., 200 ms after perturbation onset), a vertical bar 650 reflecting M1 size is displayed. When the bar height falls within the shaded area, the participant had a 651 successful conditioning trial and the bar is depicted as green. If the bar height falls out of the shaded 652 area, the bar becomes red and the trial is registered as an unsuccessful trial. This provides immediate 653 feedback on M1 size to the participant for each single trial performed.

Figure 2: Soleus and TA background EMG and the soleus M_{max} and H_{max} values for all baseline and

655 conditioning sessions in M1up (A) and M1down (B) participants in whom conditioning was successful.

Each set of a symbol and error bars represents the average (±SE) value for successfully conditioned

657 participants. N=5 for M1up (A) and N=8 for M1down (B). Circles are for the soleus background EMG

amplitude (in μ V), squares are for the TA background EMG (in μ V), diamonds are for the M_{max} (in mV),

659 and crosses are for the H_{max} (in mV).

660 Figure 3: (A) The final conditioned M1 size for individual participants. The filled symbols represented 661 successful participants in whom the average conditioned M1 for conditioning sessions 19-24 was 662 significantly increased (5 of 8 M1up participants, upward triangles) or decreased (8 of 8 M1down 663 participants, downward triangles) compared to the average baseline M1. The open symbols show the 664 three unsuccessful participants (i.e., 3 of 8 M1up participants). (B) The final conditioned M2 size for 665 individual participants. As for (A), the filled symbols represented the successful participants in whom 666 the average conditioned M1 for conditioning sessions 19-24 was significantly increased (5 of 8 M1up 667 participants, upward triangles) or decreased (8 of 8 M1down participants, downward triangles) compared 668 to the average baseline M1.

Figure 4: Average conditioned and control stretch reflexes for a representative participant of the M1up (A) and M1down (B) group. The upper panels show the change in ankle angle in degrees, the lower panels depict the average rectified SOL EMG data of the three 75-trial blocks for one baseline session and the last conditioning session in single participants. The dotted black traces represent data from a single baseline session while the red (M1up) and blue (M1down) traces represent data from the last conditioning session.

Figure 5: Average (±SE) M1 sizes and H-reflex sizes (from Thompson et al., 2009) for all successful
M1up/HRup (red upward triangle) and M1down/HRdown (blue downward triangle) participants for all
baseline and conditioning sessions. (A) upper panel: Average conditioned M1 size, middle panel:
Average control M1 size and lower panel: within sessions change (average conditioned minus control
M1 size). (B) upper panel: Average conditioned H-reflex size, middle panel: Average control H-reflex
size and lower panel: within sessions change (average conditioned minus control H-reflex size). The
vertical dotted line separates the baseline from the conditioning sessions.

Figure 6: Control M1 change with M1down conditioning. Control SOL EMG during one baseline

session (black trace) and the final conditioning session (blue trace) for n=1. Each trace is the average of
20 trials.

- 685 **Figure 7:** Within-session task dependent adaptation with M1up conditioning. Control SOL EMG during
- 686 the control trials (black trace, the first 20 trials where no visual feedback is provided) and the
- 687 conditioning trials (red trace, the three blocks of 75 trials where feedback is provided in relation to the
- 688 size of the M1 response) for n=1.









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