

ONA Item Essential Elements
For use with ADL/IADL and Medication Management Only

(updated 1/12/2022)

This document is intended to be used as a supplement to the ONA Manual and FAQs which can be found by clicking on the following link: [ONA Assessor Toolkit](#)

Instructions:

Use this document along with the Coding Decision Tree and Coding Key to accurately determine which essential elements to consider for each item when coding ADL/IADL and Medication items.

If the individual needs a support person's help at least 50% of the days the activity takes place with any or all of the steps listed in the "Setup or Clean-up" column *and* needs no help in the "During the Activity" column, code '**Setup/clean-up**'.

If the individual needs help with *any or all* of the steps listed in the "During the Activity" column, identify what kind of help is needed at least 50% of the days the activity takes place. Then consider the following options for coding:

If the individual needs full 100 % physical assistance for *all* steps in the "During the Activity" column, code '**Dependent**' regardless if help is needed in the "Setup/clean-up" column.

Or, if some help is needed at least 50% of the days the activity takes place for some or all of the steps during the activity, code the kind of help that is needed: '**Supervision**', '**Partial/Moderate**' or '**Substantial/Maximal**'.

Please note:

The list below is not exhaustive. There could be elements in a person's life that are not listed such as using conditioner in the shower, using lotion as part of a general hygiene routine or using fabric softener while doing laundry, etc. Also, don't include activities from the list that don't represent the person; for example, if the person always wears slip on shoes, don't focus on the support to tie shoes. Use your best judgment .

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<p style="text-align: center;">Item (See ONA manual for item intent)</p>	<p style="text-align: center;">Setup or Clean-up (Includes reminders/cues <u>before</u> and/or <u>after</u> the activity)</p>	<p style="text-align: center;">During the Activity (Includes reminders/cues and encouragement <u>during</u> the activity) * All steps in this column can be considered physical steps.</p>	<p style="text-align: center;">Do NOT Include (Do not consider items listed in this column when coding support needs)</p>
<p>3a: Upper Body Dressing</p>	<ul style="list-style-type: none"> • Get clothes out of drawers and/or closets • Choose appropriate clothing (clean vs. dirty, weather, etc.) 	<ul style="list-style-type: none"> • Lift arms • Put clothing on • Button, snap and zip • Put on back brace while dressing • Adjust clothing correctly 	<ul style="list-style-type: none"> • Items that are not put on and taken off while dressing (e.g., a back brace worn only while lifting heavy objects) • Individual talking support person through the steps of dressing
<p>3b: Lower Body Dressing</p>	<ul style="list-style-type: none"> • Get clothes out of drawers and/or closets • Choose appropriate clothing (clean vs. dirty, weather, etc.) 	<ul style="list-style-type: none"> • Raise legs • Pull up clothing • Button, snap and zip • Put on leg braces while dressing • Adjust clothing correctly 	<ul style="list-style-type: none"> • Items that are not put on and taken off while dressing (e.g., leg braces only worn during OT/PT) • Individual talking support person through the steps of dressing
<p>3c: Putting on/taking off footwear</p>	<ul style="list-style-type: none"> • Get footwear out of closets or off the floor • Choose appropriate footwear (for weather, etc.) 	<ul style="list-style-type: none"> • Bend down to put footwear on • Put feet in footwear/socks • Put shoes on the right feet • Tie, buckle or fasten footwear • Put on orthotics, support hose, compression socks, TED hose, AFOs 	<ul style="list-style-type: none"> • Items that are not put on/taken off while putting on/taking off footwear (e.g., compression socks for brief periods during the day) • Individual talking support person through steps of putting on/taking off footwear

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4a: Sit to stand	<ul style="list-style-type: none"> • Get assistive devices in place such as a walker or cane • Put assistive devices away 	<ul style="list-style-type: none"> • Use legs to bear weight • Use arms to bear weight • Rise up to a standing position 	<ul style="list-style-type: none"> • Ambulating • Individual talking support person through the steps of the transfer
4b: Chair/bed to chair transfer	<ul style="list-style-type: none"> • Get assistive devices in place such as a walker or cane • Put assistive devices away 	<ul style="list-style-type: none"> • Use legs to bear weight • Use arms to bear weight • Sit down in a chair or bed 	<ul style="list-style-type: none"> • Ambulating • Individual talking support person through the steps of the transfer
4c: Roll left and right	<ul style="list-style-type: none"> • Get sidelyer or another assistive device in place • Put assistive devices away 	<ul style="list-style-type: none"> • While lying down, roll from one side to another • Use side rails or devices to roll • Use arms to pull oneself to one side and/or the other 	<ul style="list-style-type: none"> • Positioning to prevent skin breakdown (if otherwise independent with rolling left and right) • Individual talking support person through the steps of rolling left and right
5b: Walks 150 feet (Consider all methods of mobility such as: walking, crawling, scooting, etc.)	<ul style="list-style-type: none"> • Get assistive devices in place such as a walker or cane • Put assistive devices away 	<ul style="list-style-type: none"> • Bear weight to walk (could include carrying someone) • Crawl or scoot • Use of adaptive devices in place such as walkers and rails if currently used to ambulate 	<ul style="list-style-type: none"> • Use of a wheelchair or scooter • Individual talking support person through the steps of walking

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<p>5c: Step onto/off a curb</p>	<ul style="list-style-type: none"> • Get assistive devices in place such as a walker or cane • Put assistive devices away 	<ul style="list-style-type: none"> • Bear weight to go up and down a curb or step (could include carrying someone) • Take a step • Use of adaptive devices such as canes, walkers, etc., if currently used to ambulate 	<ul style="list-style-type: none"> • Stairs • Individual talking support person through the steps of stepping onto/off of curbs
<p>5d: 12 steps</p>	<ul style="list-style-type: none"> • Get assistive devices in place such as a specialized rail • Put assistive devices away 	<ul style="list-style-type: none"> • Bear weight to go up and down stairs (could include carrying someone) • Take steps • Bear weight with arms to use rails to go up and downstairs 	<ul style="list-style-type: none"> • Curbs • Individual talking support person through the steps of going up/down steps
<p>5f: Wheels 150 feet</p>	<ul style="list-style-type: none"> • Get wheelchair into position for use • Plug or unplug wheelchair from charger 	<ul style="list-style-type: none"> • Use arms to propel manual wheelchair/stroller • Use controller to propel electric wheelchair • Maneuver wheelchair/scooter/stroller around corners/obstacles 	<ul style="list-style-type: none"> • A stroller or wheelchair used for the support person's convenience • Walking • Individual talking support person through the steps of wheeling

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<p style="text-align: center;">6b: Eating</p>	<ul style="list-style-type: none"> • Arrange plate, drink and/or utensils in a specific way on the table before eating due to vision or agility needs 	<ul style="list-style-type: none"> • Cut-up food while eating • Bring food and drink to the mouth • Eat in a safe manner (choke risk may be present if food is eaten too rapidly) 	<ul style="list-style-type: none"> • Modifying food consistency • Cutting up food during meal prep • Individual talking support person through the steps of eating
<p style="text-align: center;">6c: Tube feeding</p>	<ul style="list-style-type: none"> • Set out supplies for feeding • Put supplies away 	<ul style="list-style-type: none"> • Pour nutrition into bag or syringe • Watch for residuals and physically make adjustments • Flush tubing • Adjust or change g-tube settings/process as needed • Vent air from tube 	<ul style="list-style-type: none"> • Stoma care • Individual talking support person through the steps of tube feeding
<p style="text-align: center;">7a: Toilet hygiene</p>	<ul style="list-style-type: none"> • Identify the need to eliminate • Get supplies out for use • Put supplies away 	<ul style="list-style-type: none"> • Adjust clothing before use • Adjust clothing after use • Use toilet effectively and wipe after use • Flush the toilet • Empty bedpan or commode • Change and clean up soiled area of body and briefs after incontinence • Use/care of catheter, colostomy, urostomy 	<ul style="list-style-type: none"> • Transferring on and off the toilet • Washing hands • Cleaning up soiled bedding and/or bathroom • Individual talking support person through the steps of elimination

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<p>7b: Toilet transfer</p>	<ul style="list-style-type: none"> • Set up rails or handles to assist with transfer • Put supplies away 	<ul style="list-style-type: none"> • Bear weight to get on and off of a toilet • Sit down on toilet • Consider use of adaptive devices to transfer if already in place 	<ul style="list-style-type: none"> • Steps of using the toilet • Individual talking support person through the steps of transferring on/off toilet
<p>8a: Shower/bathe self</p>	<ul style="list-style-type: none"> • Set out and open supplies • Put supplies away 	<ul style="list-style-type: none"> • Adjust water temperature • Judge water temperature • Get in/out of shower • Use soap to clean body • Use shampoo to clean hair • Rinse off body • Dry off body 	<ul style="list-style-type: none"> • General hygiene activities • Individual talking support person through the steps of showering/bathing
<p>9a: Oral Hygiene</p>	<ul style="list-style-type: none"> • Set out toothpaste and toothbrush • Open toothpaste • Put toothbrush and toothpaste away 	<ul style="list-style-type: none"> • Apply toothpaste to toothbrush • Brush teeth and rinse • Floss • Clean and soak dentures • Oral care for gums 	<ul style="list-style-type: none"> • General hygiene activities • Treatments provided by dentist • Individual talking support person through the steps of oral hygiene

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10a: General Hygiene	<ul style="list-style-type: none"> • Set out and open supplies for use • Put supplies away 	<ul style="list-style-type: none"> • Brush hair • Apply deodorant • Wash face and/or hands as needed during the day • Clean ears and nose • Wash hands after using the toilet • Nail care • Shaving • Menses care • Other hygiene specific to individual 	<ul style="list-style-type: none"> • Services provided by professionals outside of the home (hairdresser, barber, nail salon) • Individual talking support person through the steps of general hygiene
12a: Housework	<ul style="list-style-type: none"> • Set out and open supplies for cleaning • Put cleaning supplies away 	<ul style="list-style-type: none"> • Usual tasks to clean all rooms of the home such as: vacuum, dust, put items away, sweep, mop, make beds, clean dishes, counters and toilets • Use chemicals and appliances to clean • Clean up items used for ADL/IADL activities 	<ul style="list-style-type: none"> • Paid housekeeping services (housecleaner) • Occasional deep cleaning • Individual talking support person through the steps of housework

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<p>13a: Make a light meal (Consider all the food/drink the individual usually consumes and the support to prepare it)</p>	<ul style="list-style-type: none"> • Set out and open supplies for making meals • Take items out of cupboards/fridge 	<ul style="list-style-type: none"> • Use knives • Use utensils • Use stove, microwave and other appliances • Use list of ingredients and cooking instructions • Complete steps of making meals • Complete steps of preparing formula/ ingredients for tube feeding • Cut up food before being served 	<ul style="list-style-type: none"> • Making complex meals, such as a Thanksgiving dinner, or other meal preparation that is not usual for the individual • Making nutritional choices • Decision of what to make • Individual talking support person through the steps of making meals
<p>14a: Laundry</p>	<ul style="list-style-type: none"> • Set out and open supplies for laundry • Put supplies away 	<ul style="list-style-type: none"> • Put dirty laundry in basket • Physically sort laundry • Take laundry to washer • Put laundry in washer • Put soap in washer • Push buttons/turn dials on washer/dryer to start • Put laundry in dryer • Take laundry out of dryer • Fold laundry • Take laundry to room • Put laundry away 	<ul style="list-style-type: none"> • Dry cleaning services • Clothing repair • Ironing • Sewing tasks • Individual talking support person through the steps of laundry

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15a: Use public transportation (Consider any motorized transportation)	<ul style="list-style-type: none"> • Provide bus schedule to individual • Reminders to set up a ride 	<ul style="list-style-type: none"> • Plan and arrange the ride • Plan/figure out routes • Open/close vehicle doors • Get in/out of vehicle • Fasten seat belt • Drive • Navigate 	<ul style="list-style-type: none"> • Walking • Riding a bike • Electric bikes • Kick scooters (scooter that one stands on on) • School bus used for transporting to/from school • Budgeting for and obtaining a bus pass
15b: Car transfer <i>*Consider supervision required for behavior in this item if it impacts ability to get in/out of car safely</i>	<ul style="list-style-type: none"> • Get assistive devices in place such as a walker or cane • Put assistive devices away 	<ul style="list-style-type: none"> • Bear weight with legs • Bear weight with arms • Transfer in/out of vehicles safely and as expected 	<ul style="list-style-type: none"> • Opening and closing vehicle doors • Fastening/unfastening seatbelts • Individual talking support person through the steps of the car transfer
16a: Money Management	<ul style="list-style-type: none"> • Set out and open bank statements and bills • Reminders to pay bills • Reminders to save money 	<ul style="list-style-type: none"> • Know money has value <i>and</i> understands some denominations • Manage finances for food, personal items, clothing and shelter • Count money • Make change • Pay bills • Write checks • Balance a checkbook/bank account • Save and budget for larger purchases • Budget for use of debit/atm card 	<ul style="list-style-type: none"> • Special needs trusts • Retirement accounts • Applying for social benefits (e.g. self-sufficiency benefits, Social Security)

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<p>17a: Light Shopping (Consider all shopping for food groceries and personal items required for the individual)</p>	<ul style="list-style-type: none"> • Create a shopping list • Put groceries away • Reminders to shop • Reminders to shop for needed items 	<ul style="list-style-type: none"> • Figure out what is needed to purchase while shopping • Shop from a list • Locate and select items • Take items from shelves • Take cart to checkout • Pay for items • Complete steps of online shopping 	<ul style="list-style-type: none"> • Budgeting • Support for mobility only • Interactions with store personnel
<p>47c: Medication management – oral medication</p>	<ul style="list-style-type: none"> • Get oral medication out of where it is stored • Open oral medication • Reminders to take medication • Put medication away 	<ul style="list-style-type: none"> • Know the correct oral medication to take • Take the correct dose • Put the pill in the mouth • Set-up pill minder • Cut/prepare medicine for dispensing 	<ul style="list-style-type: none"> • Meds used less than monthly • Ordering or picking up prescriptions and refills • Swallowing medication
<p>47d: Medication management – inhalant/mist medications</p>	<ul style="list-style-type: none"> • Get inhaler/mist out of where it is stored (includes nebulizer) • Open medication • Reminders to use medication • Put medication away 	<ul style="list-style-type: none"> • Know and dispense the correct amount of inhaler/mist • Hold mask or inhaler in the correct position • Turn on machine 	<ul style="list-style-type: none"> • Meds used less than monthly • Ordering or picking up prescriptions and refills • Taking breaths

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47e: Medication management – injectable medications	<ul style="list-style-type: none"> • Get injectable medication out of where it is stored • Open medication • Reminders to use medication • Dispose of sharps • Put medication away 	<ul style="list-style-type: none"> • Know the correct amount of injectable medication • Inject the medication in correct area of body • Inject the correct amount of medicine 	<ul style="list-style-type: none"> • Meds used less than monthly • Injections administered by medical professionals • Ordering or picking up prescriptions and refills
47f: Medication management – topical medications	<ul style="list-style-type: none"> • Get topical medication out of where it is stored • Open medication • Reminders to use medication • Put medication away 	<ul style="list-style-type: none"> • Know the correct amount of medication • Apply the topical medication to the correct area of the body • Apply eye and ear drops 	<ul style="list-style-type: none"> • Meds used less than monthly • Ordering or picking up prescriptions and refills
47g: Medication management – suppository medications	<ul style="list-style-type: none"> • Get suppository/enema out of where it is stored • Open medication • Reminders to use medication • Put medication away 	<ul style="list-style-type: none"> • Know the correct dose • Insert the suppository/ enema into the correct area of body • Insert the correct amount of medicine 	<ul style="list-style-type: none"> • Meds used less than monthly • Ordering or picking up prescriptions and refills
47h: Medication management – medications through tube	<ul style="list-style-type: none"> • Get medication and supplies out of where it is stored • Open medication • Reminders to use medication • Put medication away 	<ul style="list-style-type: none"> • Know the correct dose • Prepare tube for medication • Flush tube • Push medication through the tube • Watch for residuals • Flush with water • Turn on pump • Unkink tubing • Vent air through tube 	<ul style="list-style-type: none"> • Meds used less than monthly • Ordering or picking up prescriptions and refills