

ONA Item Essential Elements

For use with ADL/IADL and Medication Management Only

Updated 10.30.23

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.

Coding Setup/Clean-up: If the person only needs a support person's help (cues, and or physical help) with any or all of the steps listed in the 'Setup or Clean-up' column on at least 50% of the days the activity takes place and needs NO help in the 'During the Activity' column, code 'Setup/clean-up'.

If the person 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:

Coding of Dependent: If the person needs full (100%) physical assistance for ALL steps in the 'During the Activity' column, code 'Dependent' regardless if help is needed or not in the 'Setup/clean-up' column.

Remaining Coding Options: If some help is needed at least 50% of the days the activity takes place for some or all of the steps in the during the activity column, code the kind of help that is needed: 'Supervision', 'Partial/Moderate' or 'Substantial/Maximal'.

Please note:

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.

Do not include elements from the list that do not represent the person; for example, if the person always wears slip on shoes, do not focus on the support to tie shoes. Use your best judgment.

Item (See ONA Manual for item intent)	Setup/Clean-up (Includes help, reminders & cues before and/or after the activity)	During the Activity (Includes reminders, cues & encouragement <u>during</u> the activity) *All cognitive steps in this column can be considered physical steps.	Do NOT Include (Do not consider items listed in this column when coding support needs)
3a: Upper Body Dressing	<ul style="list-style-type: none"> • Get clothes out of drawers and/or closets • Choose appropriate clothing (clean vs. dirty, weather, etc.) • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Lift arms • Put clothing on • Button, snap & zip • Put on back brace while dressing • Adjust clothing correctly • Monitoring and/or cueing during the activity 	<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) • Person talking support person through the steps of dressing
3b: Lower Body Dressing	<ul style="list-style-type: none"> • Get clothes out of drawers and/or closets • Choose appropriate clothing (clean vs. dirty, weather, etc.) • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Raise legs • Pull up clothing • Button, snap, and zip • Put on leg braces while dressing • Adjust clothing correctly • Take clothing off • Monitoring and/or cueing during the activity 	<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) • Person talking support person through the steps of dressing
3c: Putting on/taking off footwear	<ul style="list-style-type: none"> • Get footwear out of closets or off the floor • Choose appropriate footwear (for weather, etc.) • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Bend down to put footwear on • Lift feet • 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 • Take shoes off • Monitoring and/or cueing during the activity 	<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) • Person talking support person through steps of putting on/taking off footwear

Item (See ONA Manual for item intent)	Setup/Clean-up (Includes help, reminders & cues before and/or after the activity)	During the Activity (Includes reminders, cues & encouragement <u>during</u> the activity) *All cognitive steps in this column can be considered physical steps.	Do NOT Include (Do not consider items listed in this column when coding support needs)
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 • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Use legs to bear weight • Use arms to bear weight • Rise up to a standing position • Complete the transfer onto the floor/ground • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Ambulating • Person 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 • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Use legs to bear weight • Use arms to bear weight • Sit down in a chair or bed • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Ambulating • Person 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 • Cues and/or physical help before or after the activity 	<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 • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Positioning to prevent skin breakdown (if otherwise independent with rolling left and right) • Person 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 • Cues and/or physical help before or after the activity 	<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 • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Use of a wheelchair or scooter • Person talking support person through the steps of walking

Item (See ONA Manual for item intent)	Setup/Clean-up (Includes help, reminders & cues before and/or after the activity)	During the Activity (Includes reminders, cues & encouragement <u>during</u> the activity) *All cognitive steps in this column can be considered physical steps.	Do NOT Include (Do not consider items listed in this column when coding support needs)
5c: Step onto /off a curb	<ul style="list-style-type: none"> • Get assistive devices in place such as a walker or cane • Put assistive devices away • Cues and/or physical help before or after the activity 	<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 • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Stairs • Person talking support person through the steps of stepping onto/off of curbs
5d: 12 steps	<ul style="list-style-type: none"> • Get assistive devices in place such as a specialized rail • Put assistive devices away • Cues and/or physical help before or after the activity 	<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 down stairs • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Curbs • Person talking support person through the steps of going up/down steps
5f: Wheels 150 feet	<ul style="list-style-type: none"> • Get wheelchair into position for use • Plug or unplug wheelchair from charger • Cues and/or physical help before or after the activity 	<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 • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • A stroller or wheelchair used for the support person's convenience • Walking • Person talking support person through the steps of wheeling

Item (See ONA Manual for item intent)	Setup/Clean-up (Includes help, reminders & cues before and/or after the activity)	During the Activity (Includes reminders, cues & encouragement <u>during</u> the activity) *All cognitive steps in this column can be considered physical steps.	Do NOT Include (Do not consider items listed in this column when coding support needs)
6b: Eating	<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 • Reminders to eat and/or drink • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Cut-up food while eating • Bring food and drink to the mouth • Eat appropriate amount of food in a safe manner (choke risk may be present if food is eaten too rapidly) • Portion out food while eating • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Modifying food consistency • Cutting up food during meal prep • Person talking support person through the steps of eating • Nutritional choices
6c: Tube feeding	<ul style="list-style-type: none"> • Set out supplies for feeding • Put supplies away • Cues and/or physical help before or after the activity 	<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 • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Stoma care • Person talking support person through the steps of tube feeding
7a: Toilet hygiene	<ul style="list-style-type: none"> • Identify the need to eliminate • Get supplies out for use • Put supplies away • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Adjust clothing before use • Adjust clothing after use • Use toilet effectively • Remain on toilet 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 • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Transferring on and off the toilet • Washing hands • Cleaning up soiled bedding and/or bathroom • Person talking support person through the steps of elimination

Item (See ONA Manual for item intent)	Setup/Clean-up (Includes help, reminders & cues before and/or after the activity)	During the Activity (Includes reminders, cues & encouragement <u>during</u> the activity) *All cognitive steps in this column can be considered physical steps.	Do NOT Include (Do not consider items listed in this column when coding support needs)
7b: Toilet transfer	<ul style="list-style-type: none"> • Set up equipment to assist with transfer • Put supplies away • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Bear weight to initially get on and get off a toilet or commode after use • Sit down on toilet • Consider use of adaptive devices to transfer if already in place • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Steps of using the toilet • Person talking support person through the steps of transferring on/off toilet
8a: Shower/bathe self	<ul style="list-style-type: none"> • Set out and open supplies • Put supplies away • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Adjust AND judge water temperature • Get in/out of shower or bath • Use soap to clean body • Use shampoo to clean hair/facial hair • Rinse off body/hair • Dry off body/hair • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • General hygiene activities • Person talking support person through the steps of showering/bathing
9a: Oral Hygiene	<ul style="list-style-type: none"> • Set out toothpaste and toothbrush • Open toothpaste • Put toothbrush and toothpaste away • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Turn on and off water • Apply toothpaste to toothbrush • Brush teeth and rinse • Floss • Oral care for gums • Put in and take out dentures from the mouth • Apply adhesive • Clean and soak dentures • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • General hygiene activities • Treatments provided by dentist • Person talking support person through the steps of oral hygiene

Item (See ONA Manual for item intent)	Setup/Clean-up (Includes help, reminders & cues before and/or after the activity)	During the Activity (Includes reminders, cues & encouragement <u>during</u> the activity) *All cognitive steps in this column can be considered physical steps.	Do NOT Include (Do not consider items listed in this column when coding support needs)
10a: General Hygiene	<ul style="list-style-type: none"> • Set out and open supplies for use • Put supplies away • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Brush/comb hair or facial 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 person • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Services provided by professionals outside of the home (hairdresser, barber, nail salon) • Person 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 • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Usual tasks to clean all rooms of the home • 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 • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Paid housekeeping services (housecleaner) • Yardwork • Pet Care • Occasional deep cleaning • Person talking support person through the steps of housework

Item (See ONA Manual for item intent)	Setup/Clean-up (Includes help, reminders & cues before and/or after the activity)	During the Activity (Includes reminders, cues & encouragement <u>during</u> the activity) *All cognitive steps in this column can be considered physical steps.	Do NOT Include (Do not consider items listed in this column when coding support needs)
13a: Make a light meal (Consider all the food/drink the person usually consumes and the support to prepare it)	<ul style="list-style-type: none"> • Set out and open supplies for making meals • Take items out of cupboards/fridge • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Use knives • Use utensils to stir and chop • Use stove • Use 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 • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Making complex meals, such as a Thanksgiving dinner, or other meal preparation that is not usual for the person • Making nutritional choices • Decision of what to make • Person talking support person through the steps of making meals
14a: Laundry	<ul style="list-style-type: none"> • Set out and open supplies for laundry • Put supplies away • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Gather dirty laundry • 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 • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Dry cleaning services • Clothing repair • Ironing • Sewing tasks • Person talking support person through the steps of laundry

Item (See ONA Manual for item intent)	Setup/Clean-up (Includes help, reminders & cues before and/or after the activity)	During the Activity (Includes reminders, cues & encouragement <u>during</u> the activity) *All cognitive steps in this column can be considered physical steps.	Do NOT Include (Do not consider items listed in this column when coding support needs)
15a: Use public transportation (Consider any motorized transportation)	<ul style="list-style-type: none"> • Provide bus schedule to person • Reminders to set up a ride • Cues and/or physical help before or after the activity 	<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 • Secure Wheelchair • Drive • Navigate • Monitoring and/or cueing during the activity 	<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 *Consider supervision required for behavior and/or traffic safety in this item if it impacts ability to get in/out of car safely	<ul style="list-style-type: none"> • Get assistive devices in place such as a walker or cane • Put assistive devices away • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Bear weight with legs • Bear weight with arms • Transfer in and out of a vehicle safely and as expected (consider supervision needed for safety) • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Opening and closing vehicle doors • Fastening/unfastening seatbelts • Person 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 • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Know money has value AND understands some denominations • Manage finances for food, personal items, clothing and shelter • Count money • Make change • Pay bills • Manage auto-bill pay • Write checks • Online banking • Balance a checkbook/bank account • Save and budget for larger purchases • Budget for use of debit/atm card • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Special needs trusts • Retirement accounts • Applying for social benefits (e.g. self-sufficiency benefits, Social Security)

Item (See ONA Manual for item intent)	Setup/Clean-up (Includes help, reminders & cues before and/or after the activity)	During the Activity (Includes reminders, cues & encouragement <u>during</u> the activity) *All cognitive steps in this column can be considered physical steps.	Do NOT Include (Do not consider items listed in this column when coding support needs)
17a: Light Shopping (Consider all shopping for food groceries and personal items required for the person)	<ul style="list-style-type: none"> • Create a shopping list • Put groceries away • Reminders to shop • Reminders to shop for needed items • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Get items while at store • Shop from a list while at store • Locate and select items • Take items from shelves • Take cart to checkout • Pay for items • Take items out of store • Complete steps of online shopping • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Budgeting • Support for mobility only • Interactions with store personnel
47c: Medication management – oral medication	<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 • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Know the correct oral medication to take • Take the correct dose • Take medication at the right time • Put the pill in the mouth • Set-up pill minder • Cut/prepare medicine for dispensing • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Medications used less than monthly • Ordering or picking up prescriptions and refills • Swallowing medication
47d: Medication management -inhalant/mist medications	<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 • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Know and dispense the correct amount of inhaler/mist • Know when to use inhaler/mist • Hold mask or inhaler in the correct position • Turn on machine • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Medications used less than monthly • Ordering or picking up prescriptions and refills • Taking breaths

Item (See ONA Manual for item intent)	Setup/Clean-up (Includes help, reminders & cues before and/or after the activity)	During the Activity (Includes reminders, cues & encouragement <u>during</u> the activity) *All cognitive steps in this column can be considered physical steps.	Do NOT Include (Do not consider items listed in this column when coding support needs)
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 • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Know the correct amount of injectable medication • Know the right time to inject medication • Inject the medication in correct area of body • Inject the correct amount of medicine • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Medications 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 • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Know the correct amount of medication • Know when to use medication • Apply the topical medication to the correct area of the body • Apply eye and ear drops • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Medications 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 • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Know the correct dose • Know when to use the medication • Insert the suppository/ enema into the correct area of body • Insert the correct amount of medicine • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Medications used less than monthly • Ordering or picking up prescriptions and refills

Item (See ONA Manual for item intent)	Setup/Clean-up (Includes help, reminders & cues before and/or after the activity)	During the Activity (Includes reminders, cues & encouragement <u>during</u> the activity) *All cognitive steps in this column can be considered physical steps.	Do NOT Include (Do not consider items listed in this column when coding support needs)
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 • Cues and/or physical help before or after the activity 	<ul style="list-style-type: none"> • Know the correct dose • Know when to administer medication • 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 • Monitoring and/or cueing during the activity 	<ul style="list-style-type: none"> • Medications used less than monthly • Ordering or picking up prescriptions and refills