<u>Assessor Checklist - Prior to ONA Submission</u>

Before submitting the completed ONA, please review the items below to ensure you have completed all necessary steps in the ONA process. Some sections/items on the tool may say "optional" but are necessary for accurate ONA completion.

Demographics Page:

✓ All four dates listed and the date the ONA was created need to be within 30 days of each other.

✓ The date entered in the 'Date assessment completed' field must match the date you click on the submit button.

✓ A note on the demographics page indicating the individual's participation or reason for non-participation is mandatory.

✓ Be sure to click on the 'add people' button to list all who contributed to the assessment process during the assessment interview and those who contributed information outside of the assessment interview.

ADL/IADLs Section:

✓ Be careful with the use of the coding option of 'person refused' when completing ONAs for those living in 24 hr. comp – group home, foster and supported living. Some supports are required for the service setting, and 'person refused' means the person is refusing the support needed, and no type of support will be provided. (see 'Appropriate Use of ONA Coding Options' – Appendix G in your manual)

✓ If an individual requires a two-person assist for the following ADLs: Dressing, Transferring and Positioning, Mobility, Eating and Tube Feeding, Elimination and Showering and Bathing, be sure to mark "Two-person assist" in the guidance section for the applicable items, and code 'Dependent'.

- ✓ If a two-person assist or exceptional supports are needed for any other item on the tool, indicate the exceptional needs in the provided notes boxes.

- ✓ If a risk item has a notes box attached to it, write the note in the notes box provided. Anything written in those small note boxes copies onto the Risk Report.

- ✓ If an individual needs a mechanical lift for ALL transfers, be sure to mark "Use mechanical lift for All transfers" in the guidance section for item 4: Transferring and Positioning.

- ✓ If the individual *can* independently judge and adjust water temperature, be sure to mark "Can judge water temperature" and "Can adjust water temperature" in the guidance section for item 8: Showering and Bathing.

Do not rely on the wording of items on the tool, always refer to the guidance side of the manual.

- Mobility Item 5a asks 'Does this person walk?'
  - *We include walking, crawling, scooting – the question to ask is: "How does this person get around?"*

- Mobility Item 5b asks 'Walks 150 feet: Once standing the ability to walk at least 150 feet in a corridor or similar space.'
  - *Consider the individual's usual ability to be mobile (walk, crawl, scoot) in a variety of settings, regardless of distance.*

- Mobility Item 5d says '12 steps: the ability to go up and down 12 steps with or without a rail.'
  - *Consider the individual's usual ability to go up and down any number of steps in a variety of settings. Focus on the stairs typically used by the individual, despite the number of steps.*

- Mobility Item 5f asks 'wheels 150 feet: Once seated in wheelchair/scooter, the ability to wheel at least 150 feet in a corridor or similar space.'
  - *Consider the individual's usual ability to maneuver the wheelchair/scooter in the home and/or community environment. Focus on the distance that is usual for the individual and the help that may be needed.*

- Eating item 6g asks 'Does the individual refuse food or liquids because of food preferences or sensory issues, such as texture or taste?'
  - *This item is intended to capture information that puts the individual at risk for malnutrition and/or dehydration. This can be a result of <u>extreme</u> food preferences.*

- Elimination item 7a 'Toilet hygiene – the ability to maintain perineal hygiene, adjust clothes before and after using toilet, commode, bedpan, urinal.'
  - *Includes all methods of elimination, including support for incontinence, catheter, urostomy and colostomy care.*

- Housework item 12a – Remember to code based on <u>ALL</u> housekeeping tasks to keep a home clean, not just the ones the individual participates in.

- Meal Preparation item 13a says 'Make a light meal – the ability to plan and prepare all aspects of a light meal such as a bowl of cereal or a sandwich and cold drink or reheat a prepared meal.'
  - *Consider the individual's usual ability to prepare all the food/drink the individual usually consumes and the support needed to prepare it.*

- Transportation item 15a says 'Use public transportation: the ability to plan and use public transportation. Includes getting in the vehicle, riding, and getting in out of the vehicle.'
  - *Consider the individual's usual ability to get from one place to another in the community using all modes of transportation (cars, buses, vans, etc...) (Do not include walking, riding a bike, or riding a scooter)*

  Transportation item 15b the 'ability to transfer in and out of a car or van'.
  - *Item 15a <u>includes getting in and getting out of a vehicle</u>, **item 15a cannot be coded as 'Dependent' unless item 15b is 'Dependent'.***

- Money Management item 16 says 'The ability to manage finances for basic necessities (food, clothing, shelter) Including counting money and making change, paying bills/writing checks, making budgeting and other financial decisions, and balancing checkbook.'
  - *Keep in mind that limits may be set by a support person or rep payee on an individual's spending once a month or more by paying bills, rent, etc. But, without those limits, the individual would need support daily to limit spending. Use your best judgment before determining coding. Focus on support needed to meet a daily need, not frequency of support given.*

- Light shopping item 17 says 'Once at store, can locate and select up to five groceries and personal care items, take to check out and complete purchasing transaction.'
  - *Consider the individual's usual ability to shop for groceries and personal care items that they typically buy. Do not focus on then number of items.*

- If any of the ADL/IADL items are coded "Not applicable", *reconsider*. Is the item really "Not applicable?" Several of the ADLs/IADLs are essential and would not be "Not applicable". For example: Elimination – It's impossible to mark "Not applicable" because the individual *must* eliminate. This is the same mindset with nearly all ADLs/IADLs.
  - *Review the intent of "Not applicable" on your Coding Key and determine the appropriate coding decision. Accurate use of "Not applicable" would be for the Medicine Administration items that don't apply to the individual.* (see 'Appropriate Use of ONA Coding Options' – Appendix G in your manual)

Behavior Section

- For Behavior items, 18-34, never mark historical behaviors in the list of presenting behaviors. If an individual has a history of behaviors, but they have not occurred in the past year, *nor have any interventions occurred to prevent behaviors*, select the applicable coding option. Indicate all historical behaviors in the notes box below the item.

- In item 32a – Susceptibility to Victimization – This item focuses on the increased risk <u>due to identified, specific active behaviors</u> exhibited by the individual, not merely poor judgment, or general susceptibility.

- In item 36c, only include Safeguarding Interventions/physical hands-on restraints and/or holds that are written into a current PBSP. These SIs and holds must have been already trained and authorized in the PBSP. If they aren't written into a PBSP, capture them in item 39f.

- If item 39a (Has PBSP been created) is marked "No", which means item 39d (Does PBSP include SIs) is greyed out, 36c (Intervention Frequency / SIs) *must* be marked "None".

- If 39a (Has PBSP been created) is marked "Yes", and 39d (Does PBSP include SIs) is marked "No", 36c (Intervention Frequency / SIs) must be marked "None".

Comprehensive Review Page

- After clicking on 'Submit', check to ensure the assessment status has changed from draft to pending or approved.

- Periodically complete a search through completed ONAs for drafts – to ensure all your drafts have been completed or submitted.