Money Management Assessment

Individual: _________________________________ Date: _______________

Yes/No or Prompt Level

1. Understands the concept of money — that it’s exchanged for desired items _____
2. Demonstrates an interest in purchasing desired items _____
3. Demonstrates an interest/ability to hold money to make purchase _____
4. Responds in someway, i.e. vocally, with gestures, physically, to indicate a desired purchase _____
5. Recognizes the difference between the value of coins and paper money _____
6. Recognizes the various coin and paper money denominations _____
7. Aware that they are to receive change and what the amount of change is _____
8. Able to do simple budgeting _____

Conclusion: ____________________________ is capable / is not capable of handling money.

Individual’s Name (circle one) ____________________________________________________________________________

The team reached this decision based on: ________________________________________________________________
                                                                                                    ________________________________________________________________
                                                                                                    ________________________________________________________________
                                                                                                    ________________________________________________________________
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                                                                                                    ________________________________________________________________

Based on the assessment, the individual can handle the following amount of cash:

Amount $ _____________________

Based on individual spending needs, the individual will have access to this amount of cash at the frequency recommended by the team:

Frequency ___________________________________________________________________________
(i.e. Weekly, upon request, daily, monthly, etc.)

Completed by: ____________________________________________________________________________

Signature/Title/Date

Prompt Level  I = Independent  GP = Gestural Prompts  VP = Verbal Prompts
Codes P = Physical Prompts  HOH = Hand over hand  * = lack of interest or beyond cognitive potential to learn