**Money Management Assessment**

NAME:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DATE\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |
| --- | --- | --- | --- |
| This person can identify the differences in coins and values: | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person can identify differences in bills and values: | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person understands exchange economy (trading something): | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person can put coins/bills in a vending machine: | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person understands delayed reinforcement (e.g. saving for something) : | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person can count coins and bills correctly: | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person can communicate needs to store clerk/cashier: | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person can choose a appropriate item for purchase: | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person can budget spending money/allowance: | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person can take a desired item to cashier and wait in line appropriately: | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person understands waiting for appropriate change after purchase: | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person earns money at work/day program: | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person understands accessing money from his Payee account: | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person maintains a personal checking account: | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |
| This person balances checking account and makes banking transactions: | Yes 🞎 | No 🞎 | W/Assist 🞎 |
| Comments: | | | |

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Person Completing Assessment

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Date

IDT Discussion:

Date:

Recommendations:

Based on the above assessment and IDT Discussion the following has been determined (check all that apply):

|  |  |
| --- | --- |
| **√** | **Action** |
|  | This person still needs support of a payee for personal monies and is not capable of management of the payee account. |
|  | This person has the skills to begin to have more control over his/her personal monies and the recommendations made by the ID Team above will be implemented. |
|  | This person has the skills to manage their own money independently and movement towards eliminating the payee account and give him/her control will be initiated. |
|  | This person already manages his personal monies. |