

## 7. Managing Money

Is the person able to manage money?

No

Task	Is the person able to recognize the difference between paper money and coins?	Is the person able to understand what a bill is and how to pay it?	Is the person able to write a check?	Is the person able to count money?
Why not?	- Cognitive issues	- Cognitive issues	- Decreased upper extremity skills - Doesn't understand - Can't see	- Cognitive issues
Intervention?	OT	OT	OT	OT
Solutions and Strategies	<ul style="list-style-type: none"> <li>- Education</li> <li>-Task analysis</li> <li>- Trusted assistant</li> <li>- Visual cues / crib sheet</li> <li>- Braille money marker</li> <li>- Bill folding techniques</li> </ul>	<ul style="list-style-type: none"> <li>- Online</li> <li>- Education</li> <li>-Task analysis</li> <li>- Trusted assistant</li> </ul>	<ul style="list-style-type: none"> <li>- Writing aids</li> <li>- Education</li> <li>- Check writing guide</li> <li>-Task analysis</li> <li>- Trusted assistant</li> </ul>	<ul style="list-style-type: none"> <li>- Education</li> <li>-Task analysis</li> <li>- Trusted assistant</li> <li>- Visual cues / crib sheet</li> </ul>

Is the person able to manage money?

No

Task	Is the person able to manage their finances?			
Why not?	<ul style="list-style-type: none"> <li>- Bad credit</li> <li>- Debt</li> <li>- Computer</li> <li>- No ID</li> <li>- No Internet</li> <li>- Debt-income ratio</li> <li>- Poor planning</li> <li>- No money to manage</li> </ul>			
Intervention?	OT, Financial planner			
Solutions and Strategies	<ul style="list-style-type: none"> <li>- Peer support</li> <li>- Life Skills coach</li> <li>- Transportation</li> <li>- Help with research and gathering required documentation</li> <li>- Financial planner</li> <li>- Budgeting technologies</li> <li>- Budgeting education</li> <li>- Trusted caregiver / family member</li> <li>- Case manager</li> </ul>			