

## The Assessment of Functional Living Skills - The AFLS®

### Money Management (Continued)

TASK	SCORE	TASK NAME	TASK OBJECTIVE	QUESTION	EXAMPLE	CRITERIA	COMMENTS
MM 13	0 1 2 3 4 0 1 2 3 4 0 1 2 3 4 0 1 2 3 4	Develops budget	Learner will develop a monthly and weekly budget that provides for all major needs (food, shelter, clothing, and grooming supplies).	Does learner prepare a list of upcoming expenses and then develop a monthly and weekly budget based on anticipated income?	Anticipates bills that need to be paid weekly, monthly, yearly (car insurance, renter's insurance, health insurance), etc.	4= develops a monthly and weekly budget, and adjusts spending when has unexpected but necessary expenses, 3= develops a monthly and weekly budget but requires verbal prompts to make adjustments in spending due to unexpected but necessary expenses, 2= makes a weekly budget, 1= makes a weekly budget with only verbal prompting	
MM 14	0 1 2 3 4 0 1 2 3 4 0 1 2 3 4 0 1 2 3 4	Spends within budget	Learner will demonstrate responsible spending within a budget.	Does learner spend money in a responsible manner that is consistent with a budget?	Knows how much money is available for discretionary spending, does not buy expensive meals at first of month so will have food to eat at the end of the month	4= consistently spends money within a budget, 3= requires monthly monitoring by caregiver to ensure that spending is within budget, 2= requires weekly monitoring by caregiver to ensure that spending is within budget, 1= requires twice weekly monitoring by caregiver to ensure that spending is within budget	NEEDS CLOSE SUPERVISION
MM 15	0 1 2 0 1 2 0 1 2 0 1 2	Manages cash flow	Learner will manage the flow of incoming funds in consideration of purchases and the payment of bills.	Can learner manage the ongoing flow of cash (the timing of income and expenses)?	Checks balance on account, and remembers that \$40 will be automatically deducted next week to pay electric bill so can't spend that money today unless will be getting paid before the bill is sent from bank	2= consistently arranges to make purchases and payments when has funds available, 1= requires assistance as to when to make purchases and payments so as to avoid running out of money	NEEDS CLOSE SUPERVISION
MM 16	0 1 2 0 1 2 0 1 2 0 1 2	Plans financial considerations for outings	Learner will plan for financial needs for non-routine trips and outings, by planning for routine expenses, and possible scenarios that fall outside of the plan.	Can learner plan for an outing and anticipate financial considerations?	Plans for weekend visit to a relative's house that will include going to a concert on one of the evenings	2= plans for financial needs for non-routine trips and outings, by planning for common expenses, and possible scenarios that fall outside of the plan, 1= plans for financial needs for routine and familiar outings	